

2014-2015 California Middle Class Scholarship (MCS) Web Application

The target audience for this user guide is individuals who utilize the CA Middle Class Scholarship web application interface to upload their import specification.



CALIFORNIA
STUDENT AID
COMMISSION

**PAYMENT
GUIDE**

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REVISION HISTORY

Date	Version #	Document Change
06/04/2014	.01	Draft version created.
06/05/2014	.02	Draft version sent for review.
06/17/2014	.03	Draft version sent for review to stakeholders.
06/20/2014	.04	Draft version sent for review to UC and CSU Campuses
07/21/2014	.05	Updated to reflect budget bill language
10/31/2014	.06	Updated to include Correction Processing

DRAFT

INTRODUCTION

This user guide contains all essential information for the reader to understand the *MCS Payment* process for the 2014-2015 version of the MCS web application.

The purpose of the guide is to describe the functions and include supporting graphics to depict the end-user's interaction and the application's behavior that will be available September 29, 2014.

1.1 SCOPE

The scope of the document is a high-level overview of the features that have been developed and deployed with this version of the software release. This document is not a comprehensive user manual. This document is not intended to supersede any of the processes, procedures and/or policies that are currently in place for the MCS program.

1.2 SYSTEM REQUIREMENTS

The web application is designed for use with the following web browsers:

- Microsoft Internet Explorer version 10.0 or higher
- Mozilla Firefox version 29.0.1 or higher
- Google Chrome version 35.0.1916.114 or higher
- Apple Safari version 5.1.9 or higher

The computer should also meet the minimum system requirements provided by the manufacturer of the browser being used. The web application will perform best on computers with a high-speed internet connection similar to Digital Subscriber Line (DSL), cable, or faster. It is not recommended for use with computers using dial-up modem based internet connection.

Note: The *MCS Payment File* **must** be a fixed field length text file with an encoding of **ANSI** and shall **not** exceed 25MB.

1.3 ACCESSIBILITY REQUIREMENTS

To access the MCS web application you **must** have a WebGrants user account. If you do **not** have a WebGrants user account contact your *School Administrator*. If your school does not have a *School Administrator* contact the CSAC Help Desk at 1-888-294-0148 or by email at:

csachelpdesk@csac.ca.gov to request an account.

MCS PAYMENT GUIDELINES

1.1. INTRODUCTION

The second phase of the MCS process requires the transmission of student enrollment data to CSAC through the WebGrants system. The financial aid eligibility data included in the enrollment files will allow CSAC to determine the maximum MCS award amounts for eligible students.

Enrollment files were submitted to the Commission by September 2, 2014. The Commission notified eligible MCS students, by email or hard copy letter, on September 15, 2014 of their 2014-15 MCS award. Awarded MCS students can view their award information on WebGrants for Students. These students will also be accessible to campuses via an on-line MCS roster as well as a Roster File download report.

There are two ways to submit a payment: by **Batch Upload** (Section 1.3. Uploading the MCS Payment File) or by **Online Payment Roster** (Section 1.4. Using the Online Payment Roster).

During the initial payment period, beginning on September 29, 2014, only payment transactions will be processed. The correction process will be made available within a couple of weeks following the deployment of the payment processing. CSAC will process the uploaded payment files every Friday night and update all MCS records the following week. The delivery of funds is expected on a weekly basis, approximately one week after payments are processed.

1.1.1. ASSUMPTIONS:

To complete the MCS Payment process the following assumptions have been made:

- The reporting individual has a valid WebGrants user account
- The reporting individual has access to the MCS menu
- The reporting individual has valid MCS Data to report
- The reporting individual has a valid MCS Payment File to upload*

1.2. MCS FILE ELEMENTS AND PROCESSING

As campuses prepare to request MCS payments, the following sections below provide guidance on the relevant fields to verify.

Field 9, ISIR/Cal ISIR Transaction Number used for Financial Aid determination**Field 10, Student's Dependency Status:**

- Dependent
- Independent

Field 11, Total Income:

- \$150,000 or less

Field 12, Student's Federal Aid:

- Pell Grant
- FSEOG
- Teach Grant
- BIA Grants

Field 13, Student's Institutional Grants and Fee Waivers:

- Need-based grants
- Merit based scholarships, including athletic scholarships, the portion of which is specifically designated for tuition and fees
- Mandatory fee waivers such as Alan Pattee
- Veteran's benefits designated for mandatory system wide tuition and fees
- Other fee waivers (Vocational rehabilitation, employee tuition assistance, etc)
- EOP
- Institutionally administered scholarships specifically designated for fees

Field 14, Student's State Aid:

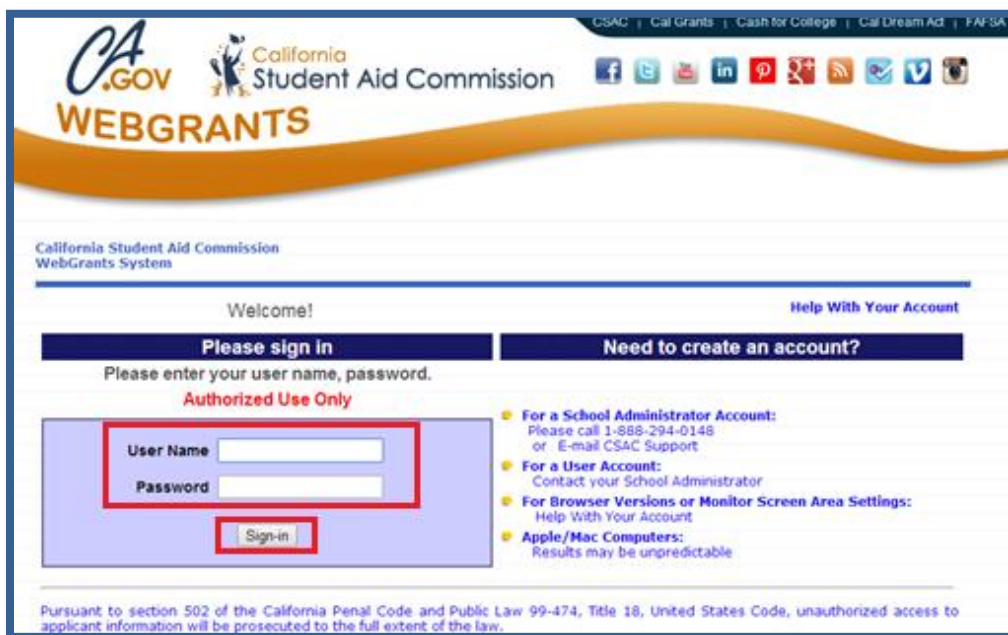
- Chafee Grant
- Child Development Grant
- LEPD
- National Guard

Field 21, Fall MCS Award Payment

Note: Cal Grants are considered when determining MCS eligibility but are not reported by the school, CSAC will verify Cal Grant award values during the awarding process.

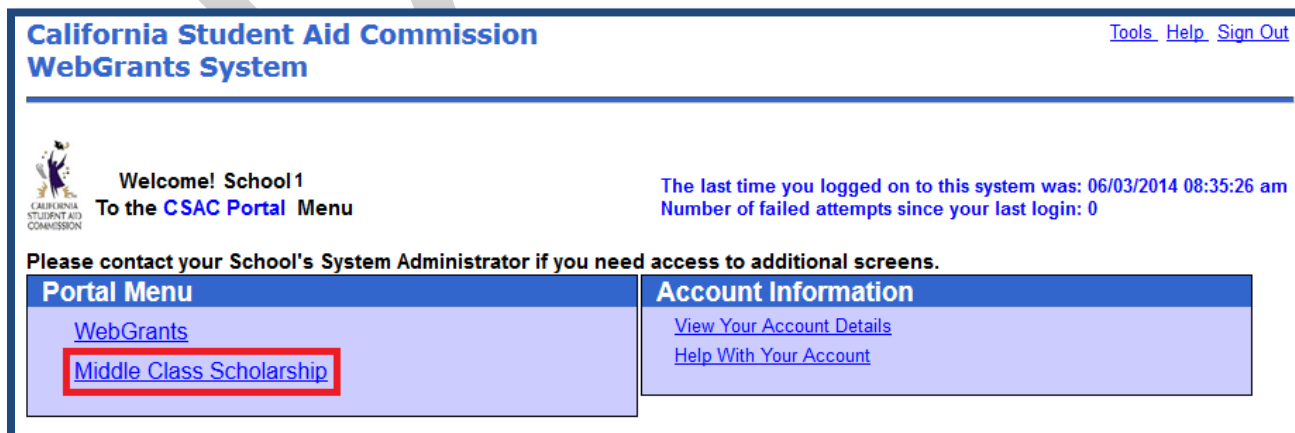
1.3.UPLOADING THE MCS PAYMENT FILE:

1. Navigate to the [WebGrants System](#) login page.
 - This is the entry point through which all authorized users can access the WebGrants application.
2. Enter the **User Name** and **Password** and select the the **Sign-in** button.



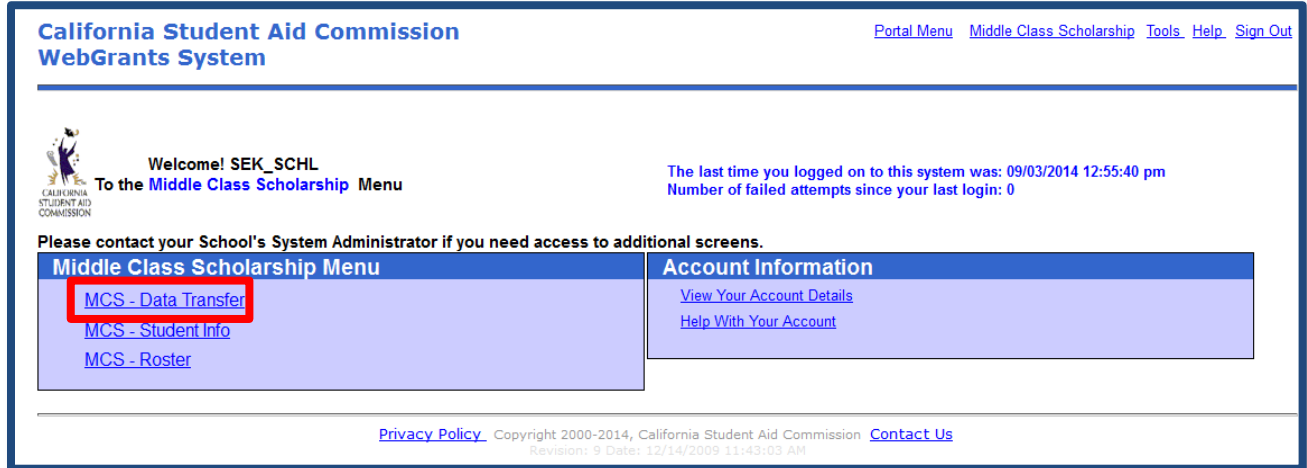
Screen 1 – WebGrants System – Login

3. The system will display the **CSAC Portal Menu** screen upon successfully authenticating the login credentials.
 - **Note:** Depending on the profile authorization there may be more options available in the **CSAC Portal Menu**.
4. Select the **Middle Class Scholarship** menu selection.



Screen 2 – WebGrants System – CSAC Portal Menu

- The system will display the **Middle Class Scholarship Menu** screen.



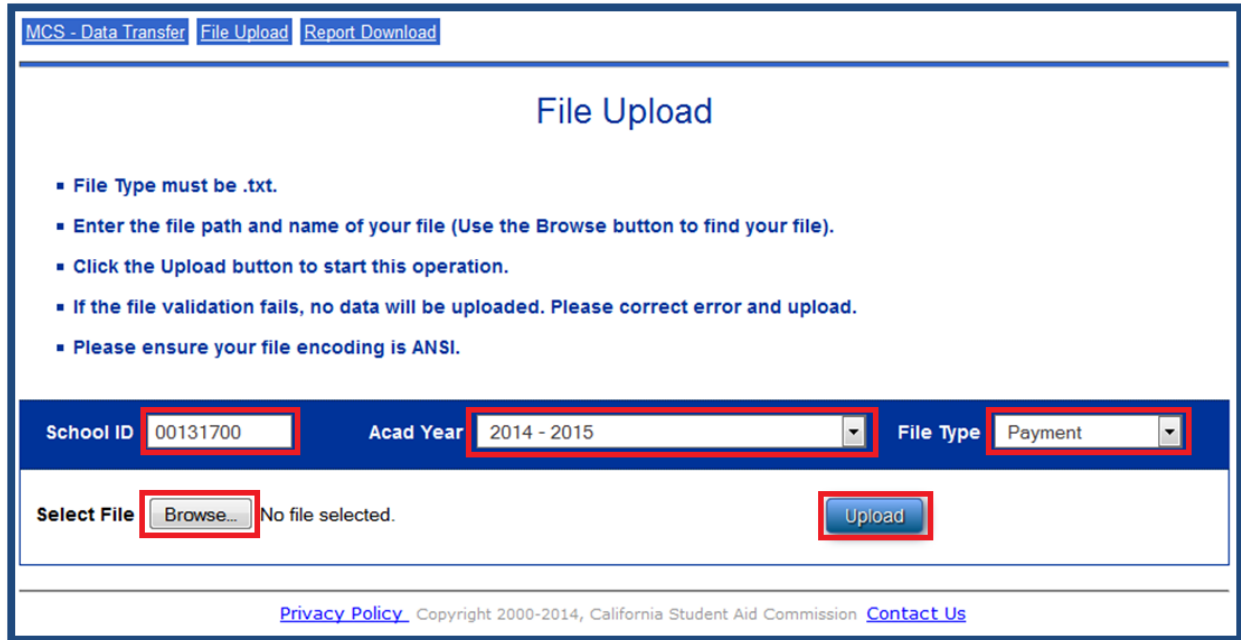
Screen 3 – WebGrants System – Middle Class Scholarship Menu

- Select the “MCS – Data Transfer” option.
- The system will display the **MCS – Data Transfer Menu** screen.



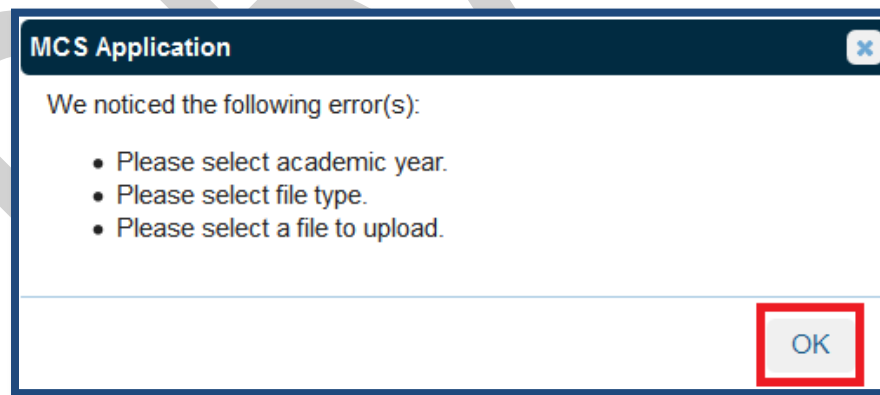
Screen 4 – MCS Payment File - Data Transfer Menu

- Select the File Upload menu selection.
- The system will display the **MCS File Upload** screen.
- If requested, enter the **School ID**, select the **Academic Year** and select the **File Type**. Under **File Type**, select “Payment”.
- Select the **File** to upload by selecting the **Browse** button.
- Select the **Upload** button.



Screen 5 – MCS Payment File – File Upload Screen

13. If the **Academic Year**, **File Type**, and **File** are not selected, the system will display an exception message.
14. Select the **OK** button.
15. The system will display the **MCS File Upload** screen.
16. Select the **Academic Year**, **File Type** and **File** to upload.



Screen 6 – MCS Payment File– File Upload – File Upload Exception Message

17. If the file type does not comply with file format requirements, the system will display an exception message.

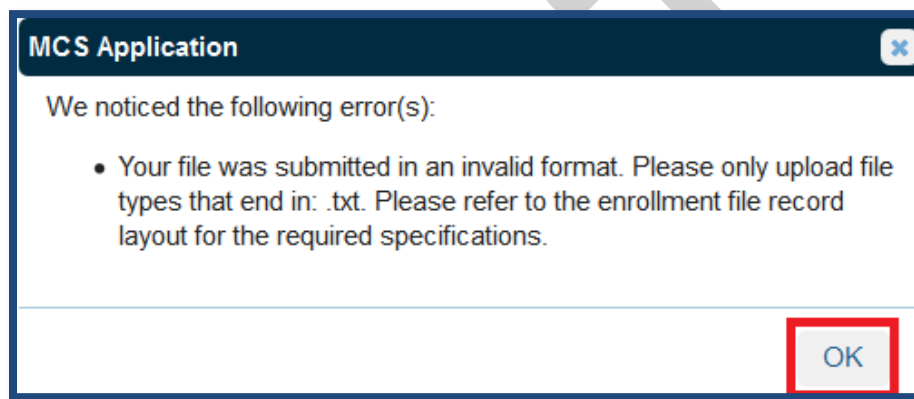
- **Note:** The file format **must** be a **fixed field length text file** with an encoding of **ANSI** and shall **not** exceed 25MB

18. Select the **OK** button.

19. The system will display the **MCS File Upload** screen.

20. Correct the **File Format** so that it complies with the requirements.

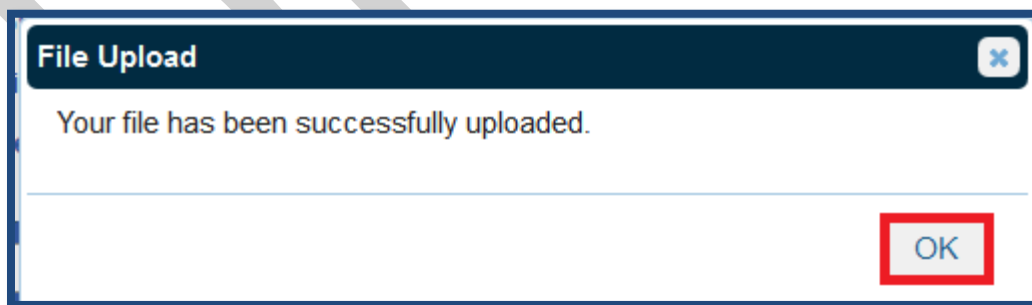
21. Select the corrected file to re-upload.



Screen 7 – MCS Payment File– File Upload – File Format Exception Message

22. If the file passes the file format validation, the system will display the **MCS Successful Upload** dialogue box.

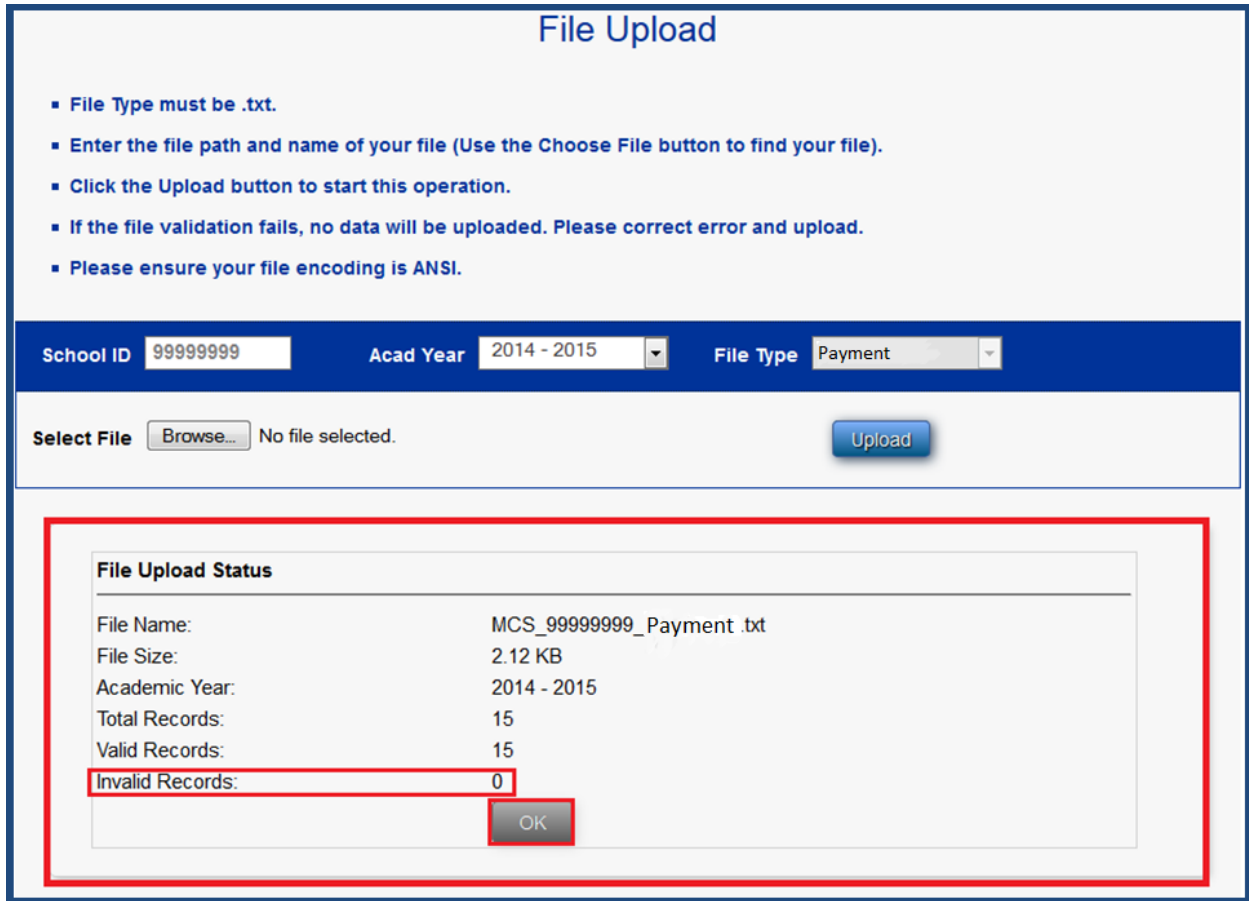
23. Select the **OK** button.



Screen 8 – MCS Payment File – File Upload – Successful Upload Message

24. The system will display the **MCS File Upload Status** embedded panel which provides a high level overview of the file status.

- **Note:** There are no invalid records for this file.



The screenshot shows the 'File Upload' interface. At the top, there are instructions: 'File Type must be .txt.', 'Enter the file path and name of your file (Use the Choose File button to find your file).', 'Click the Upload button to start this operation.', 'If the file validation fails, no data will be uploaded. Please correct error and upload.', and 'Please ensure your file encoding is ANSI.' Below these instructions is a form with 'School ID' (99999999), 'Acad Year' (2014 - 2015), and 'File Type' (Payment). A 'Select File' section shows 'Browse...' and 'No file selected.' with an 'Upload' button. The 'File Upload Status' panel is highlighted with a red border and contains the following information:

File Upload Status	
File Name:	MCS_99999999_Payment .txt
File Size:	2.12 KB
Academic Year:	2014 - 2015
Total Records:	15
Valid Records:	15
Invalid Records:	0

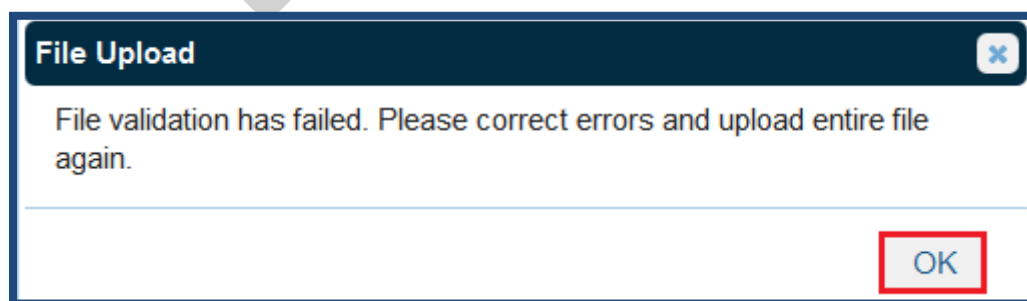
An 'OK' button is located at the bottom right of the status panel.

Screen 9 – MCS Payment File – File Upload – Successful Upload – File Upload Status

25. If the file fails field level validation, the system will reject the file and display an exception message.

- **Note:** The file **must** be corrected and the **entire file** must be **uploaded** again.

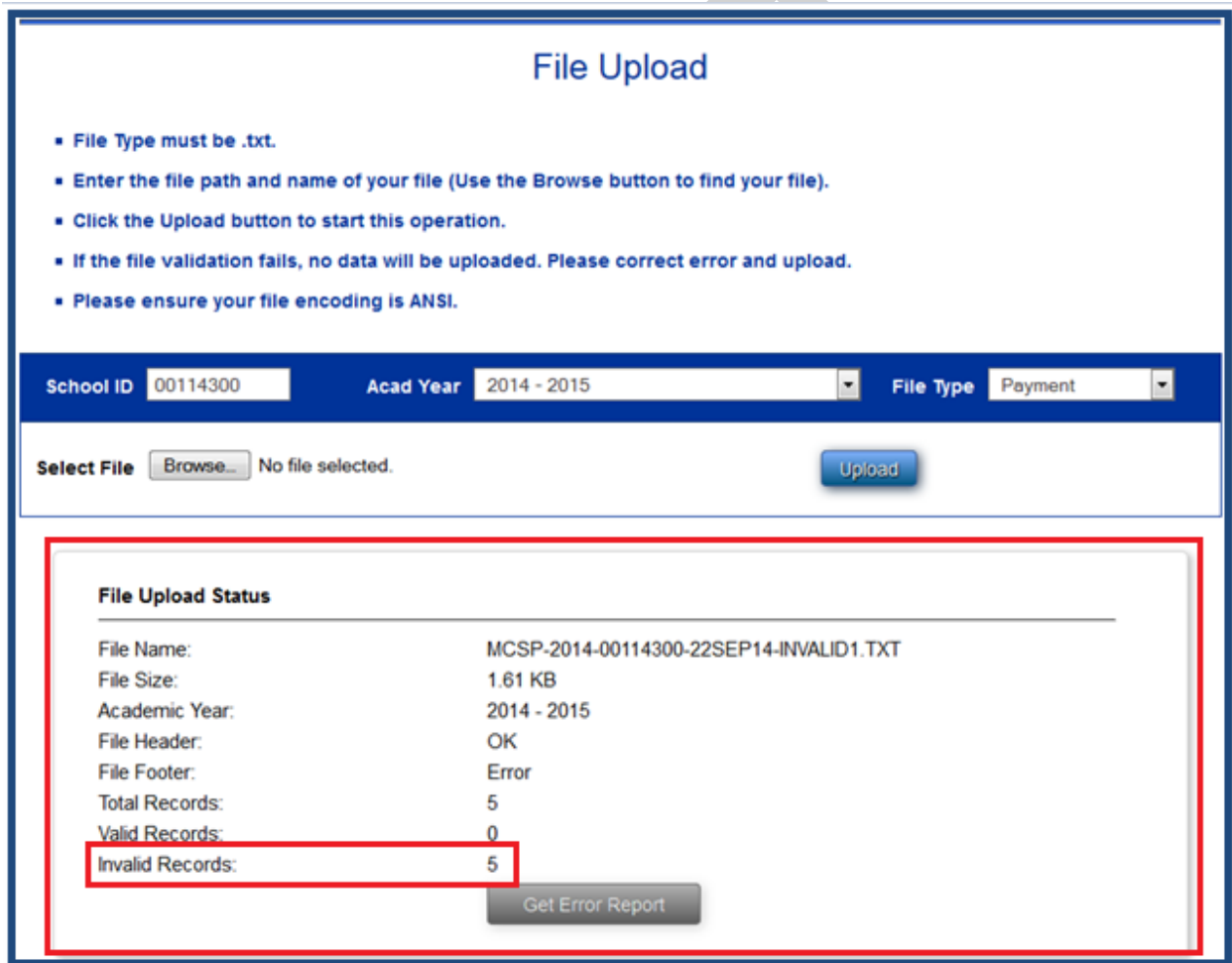
26. Select the **OK** button.



The screenshot shows a 'File Upload' dialog box with a dark blue header. The message inside reads: 'File validation has failed. Please correct errors and upload entire file again.' At the bottom right, there is an 'OK' button highlighted with a red border.

Screen 10 – MCS Payment File – File Upload – Validation Failure Exception Message

27. The system will display the **File Upload Status** embedded panel which provides a high level overview of the file status.
28. Review the file status details.
29. The system will display the **Get Error Report** button **only** when invalid records are discovered in the file.
30. Select the **Get Error Report** button.



File Upload

- File Type must be .txt.
- Enter the file path and name of your file (Use the Browse button to find your file).
- Click the Upload button to start this operation.
- If the file validation fails, no data will be uploaded. Please correct error and upload.
- Please ensure your file encoding is ANSI.

School ID: 00114300 Acad Year: 2014 - 2015 File Type: Payment

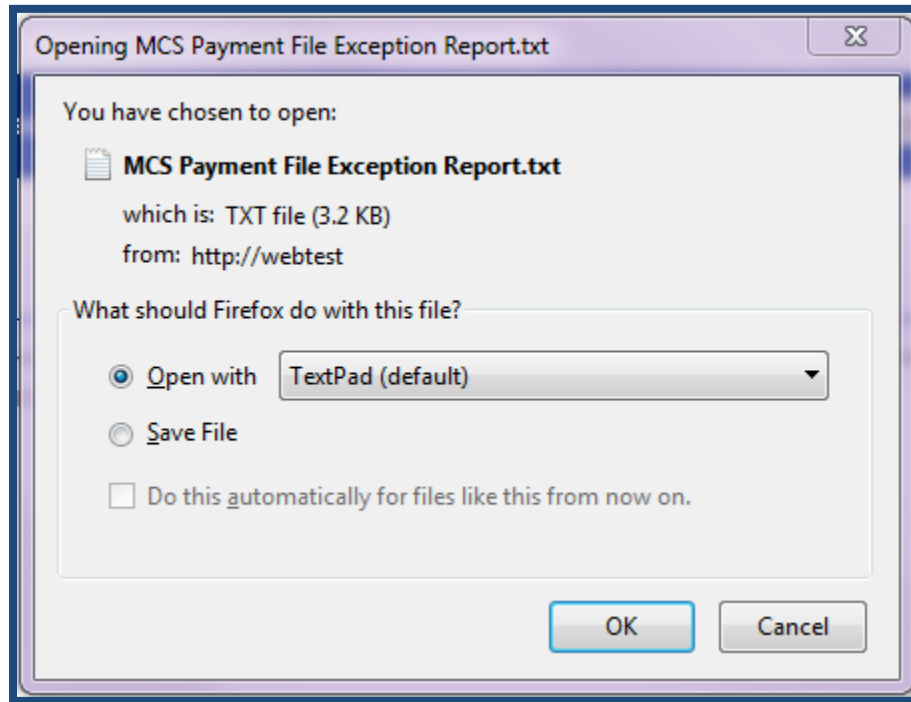
Select File: No file selected.

File Upload Status

File Name:	MCSP-2014-00114300-22SEP14-INVALID1.TXT
File Size:	1.61 KB
Academic Year:	2014 - 2015
File Header:	OK
File Footer:	Error
Total Records:	5
Valid Records:	0
Invalid Records:	5

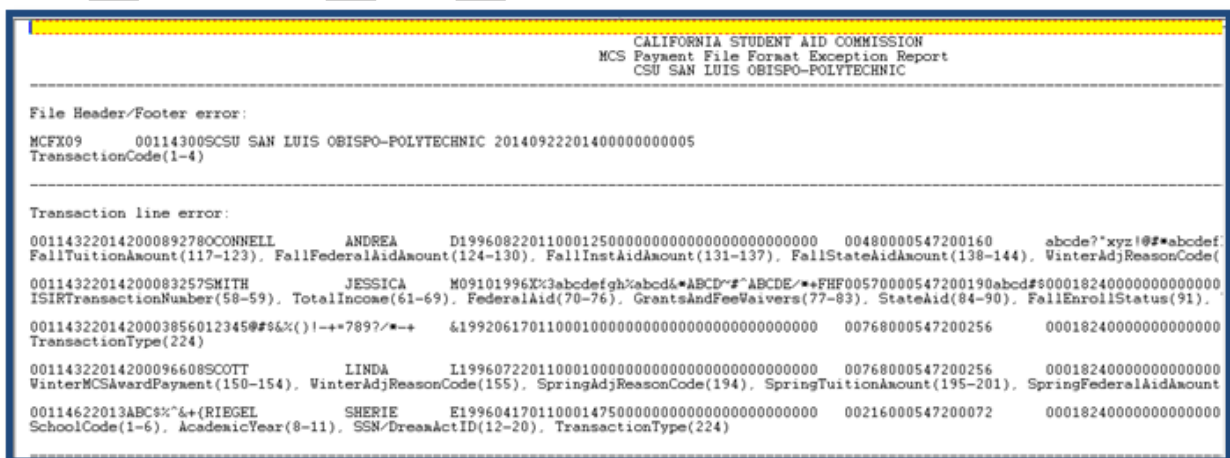
Screen 11 – MCS Payment File– File Upload – File Upload Status – Invalid Records

31. The system will display the **MCS Payment File Format Exception Report** dialogue box.
32. Select the **OK** button.



Screen 12 – MCS Payment File– File Upload – Validation Error Report Dialogue Box

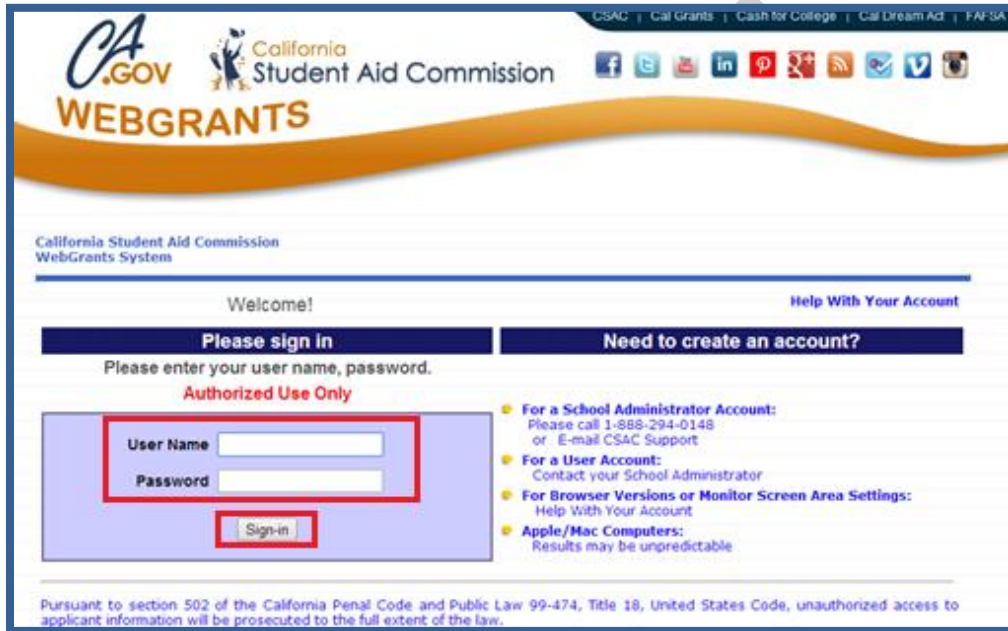
33. The system will display the **MCS Payment File Format Exception Report** which provides the details of the errors for each of the invalid records.
34. Correct the invalid records in the file and resubmit the **entire** file.



Screen 13 – MCS Payment File – File Upload – Validation Error Report

1.3. USING THE ONLINE PAYMENT ROSTER

1. Navigate to the [WebGrants System](#) login page.
 - i. This is the entry point through which all authorized users can access the WebGrants application.
2. Enter the **User Name** and **Password** and select the **Sign-in** button.




Screen 1 – WebGrants System – Login

3. The system will display the **CSAC Portal Menu** screen upon successfully authenticating the login credentials.
 - **Note:** Depending on the profile authorization there may be more options available in the **CSAC Portal Menu**.
4. Select the [Middle Class Scholarship](#) menu selection.

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WebGrants System

[Tools](#) [Help](#) [Sign Out](#)



Welcome! School1
To the **CSAC Portal** Menu

The last time you logged on to this system was: 06/03/2014 08:35:26 am
Number of failed attempts since your last login: 0

Please contact your School's System Administrator if you need access to additional screens.


Portal Menu WebGrants Middle Class Scholarship	Account Information View Your Account Details Help With Your Account
---	---

Screen 2 – WebGrants System – CSAC Portal Menu

- The system will display the *Middle Class Scholarship Menu* screen.
- Select *MCS – Roster*.

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WebGrants System

[Portal Menu](#) [Middle Class Scholarship](#) [Tools](#) [Help](#) [Sign Out](#)



Welcome! SEK_SCHL
To the **Middle Class Scholarship** Menu

The last time you logged on to this system was: 09/03/2014 12:55:40 pm
Number of failed attempts since your last login: 0

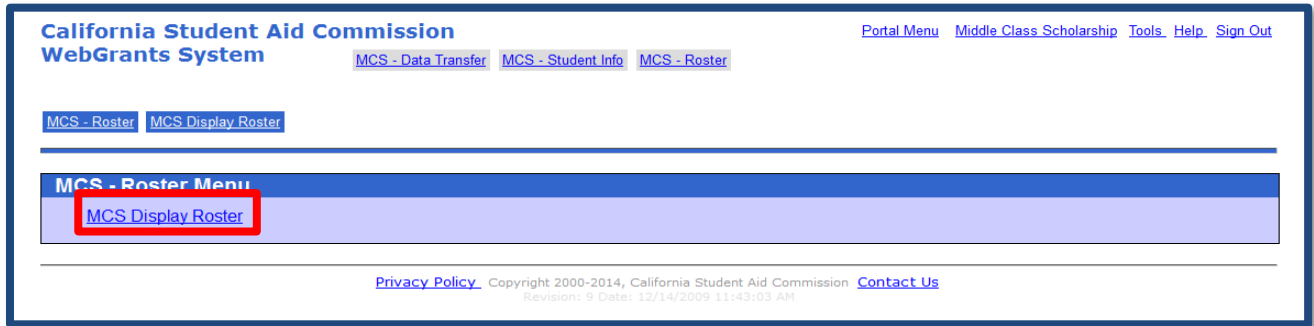
Please contact your School's System Administrator if you need access to additional screens.

Middle Class Scholarship Menu MCS - Data Transfer MCS - Student Info MCS - Roster	Account Information View Your Account Details Help With Your Account
---	---

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Revision: 9 Date: 12/14/2009 11:43:03 AM

Screen 3 – WebGrants System – Middle Class Scholarship Menu

- The system will display the *MCS – Roster Menu* screen.
- Select *MCS Display Roster*.



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WebGrants System

[Portal Menu](#) [Middle Class Scholarship](#) [Tools](#) [Help](#) [Sign Out](#)

[MCS - Data Transfer](#) [MCS - Student Info](#) [MCS - Roster](#)

[MCS - Roster](#) [MCS Display Roster](#)

MCS - Roster Menu

MCS Display Roster

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Revision: 9 Date: 12/14/2009 11:43:03 AM

Screen 4 – WebGrants System – Middle Class Scholarship Menu – MCS – Roster Menu

9. The system will display the **Middle Class Scholarship – School Roster** screen.
10. A **SSN/CSAC ID**, **First Name**, or **Last Name** is required for a **Search**. Select the **School ID**, **Acad Year** and enter a **Search ID** (either SSN or CSAC ID) or enter the **First Name** or **Last Name** to search.



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WebGrants System

[Portal Menu](#) [Middle Class Scholarship](#) [Tools](#) [Help](#) [Sign Out](#)

[MCS - Data Transfer](#) [MCS - Student Info](#) [MCS - Roster](#)

[MCS - Roster](#) [MCS Display Roster](#)

Middle Class Scholarship - School Roster

- Enter the SSN/CSAC ID or First Name or Last Name for Search.
- Partial first name with minimum 3 characters.
- Partial last name with minimum 2 characters.

School ID

Acad Year

Search ID

First Name

Last Name

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Screen 5 – MCS – Roster Menu – Middle Class Scholarship – School Roster

11. Click the **Search** button.
12. The system will generate an error message if the **SSN/CSAC ID**, **First Name**, or **Last Name** is missing.

13. Click the **OK** button and enter the missing information on the **Middle Class Scholarship – School Roster** screen to **Search**.

MCS Application

We noticed the following error(s):

- Please enter SSN/CSAC ID or First name or Last name for search.

OK

Screen 6 – MCS – Roster Menu – Middle Class Scholarship – School Roster – MCS Missing Error Screen

14. The system will generate a table with the search results. Click on the highlighted row to access the student's roster information.

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WebGrants System

[Portal Menu](#)
[Middle Class Scholarship](#)
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[MCS - Data Transfer](#)
[MCS - Student Info](#)
[MCS - Roster](#)

[MCS - Roster](#)
[MCS Display Roster](#)

Middle Class Scholarship - School Roster

- Enter the SSN/CSAC ID or First Name or Last Name for Search.
- Partial first name with minimum 3 characters.
- Partial last name with minimum 2 characters.

School ID00131200Acad Year2014 - 2015Search IDSSN

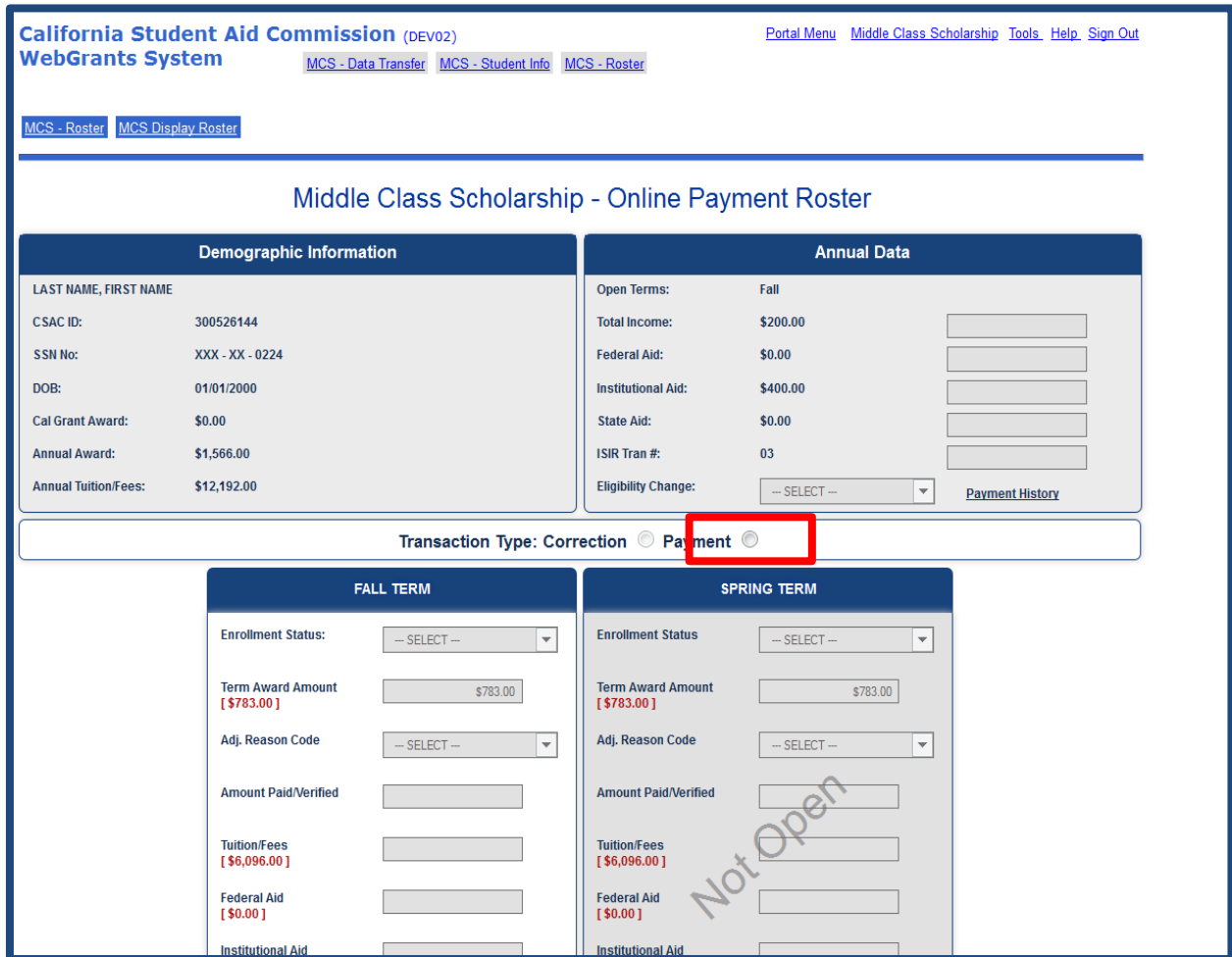
First NameLast NameLASTSearch

SSN	CSAC ID	Last Name	First Name	DOB
000100223	300526143	LAST NAME	FIRST NAME	01/01/1985
000100224	300526144	LAST NAME	FIRST NAME	01/01/2000

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Screen 7 – MCS – Roster Menu – Middle Class Scholarship – School Roster

15. The system will display the **Middle Class Scholarship – Online Payment Roster**, showing **Demographic Information**, **Annual Data** and **Term** data.



California Student Aid Commission (DEV02)
WebGrants System

Portal Menu Middle Class Scholarship Tools Help Sign Out

MCS - Data Transfer MCS - Student Info MCS - Roster

MCS - Roster MCS Display Roster

Middle Class Scholarship - Online Payment Roster

Demographic Information		Annual Data	
LAST NAME, FIRST NAME		Open Terms:	Fall
CSAC ID:	300526144	Total Income:	\$200.00
SSN No:	XXX - XX - 0224	Federal Aid:	\$0.00
DOB:	01/01/2000	Institutional Aid:	\$400.00
Cal Grant Award:	\$0.00	State Aid:	\$0.00
Annual Award:	\$1,566.00	ISIR Tran #:	03
Annual Tuition/Fees:	\$12,192.00	Eligibility Change:	--- SELECT ---
			Payment History

Transaction Type: Correction ☐ **Payment ☒**

FALL TERM	SPRING TERM
Enrollment Status: --- SELECT ---	Enrollment Status: --- SELECT ---
Term Award Amount [\$783.00]	Term Award Amount [\$783.00]
Adj. Reason Code: --- SELECT ---	Adj. Reason Code: --- SELECT ---
Amount Paid/Verified	Amount Paid/Verified
Tuition/Fees [\$6,096.00]	Tuition/Fees [\$6,096.00]
Federal Aid [\$0.00]	Federal Aid [\$0.00]
Institutional Aid	Institutional Aid

Screen 8 – MCS – Roster Menu – Middle Class Scholarship – School Roster – Online Payment Roster

Note: For the first 2 weeks, only **Payments** will be accepted. No **Corrections** will be accepted.

16. Verify the **Demographic Information** and **Annual Data**.
17. Click on the **Payment** radio button.
18. If the student data is incorrect, please note their record in your file and submit a **Correction** when the function is available.

19. If the student data is correct, under **Fall Term**, select the **Enrollment Status** of the student: Half-time or more (Pay), Less than Half-time (Do Not Pay) or Not Enrolled. Only students attending half-time or more will qualify for a payment.

Demographic Information		Annual Data	
LAST NAME, FIRST NAME		Open Terms:	Fall
CSAC ID:	300526144	Total Income:	\$200.00
SSN No:	XXX - XX - 0224	Federal Aid:	\$0.00
DOB:	01/01/2000	Institutional Aid:	\$400.00
Cal Grant Award:	\$0.00	State Aid:	\$0.00
Annual Award:	\$1,566.00	ISIR Tran #:	03
Annual Tuition/Fees:	\$12,192.00	Eligibility Change:	-- SELECT --
		Payment History	

Transaction Type: Correction ☐ Payment ☒

FALL TERM	SPRING TERM
Enrollment Status: -- SELECT -- <div> -- SELECT -- HT or more- (Pay) Less Than HT - (Do Not Pay) Not Enrolled </div>	Enrollment Status: -- SELECT --
Term Award Amount [\$783.00]	Term Award Amount [\$783.00]
Adj. Reason Code: -- SELECT --	Adj. Reason Code: -- SELECT --
Amount Paid/Verified	Amount Paid/Verified
Tuition/Fees [\$6,096.00]	Tuition/Fees [\$6,096.00]
Federal Aid [\$0.00]	Federal Aid [\$0.00]
Institutional Aid [\$200.00]	Institutional Aid [\$200.00]
State Aid [\$0.00]	State Aid [\$0.00]
Payment Status:	Payment Status:

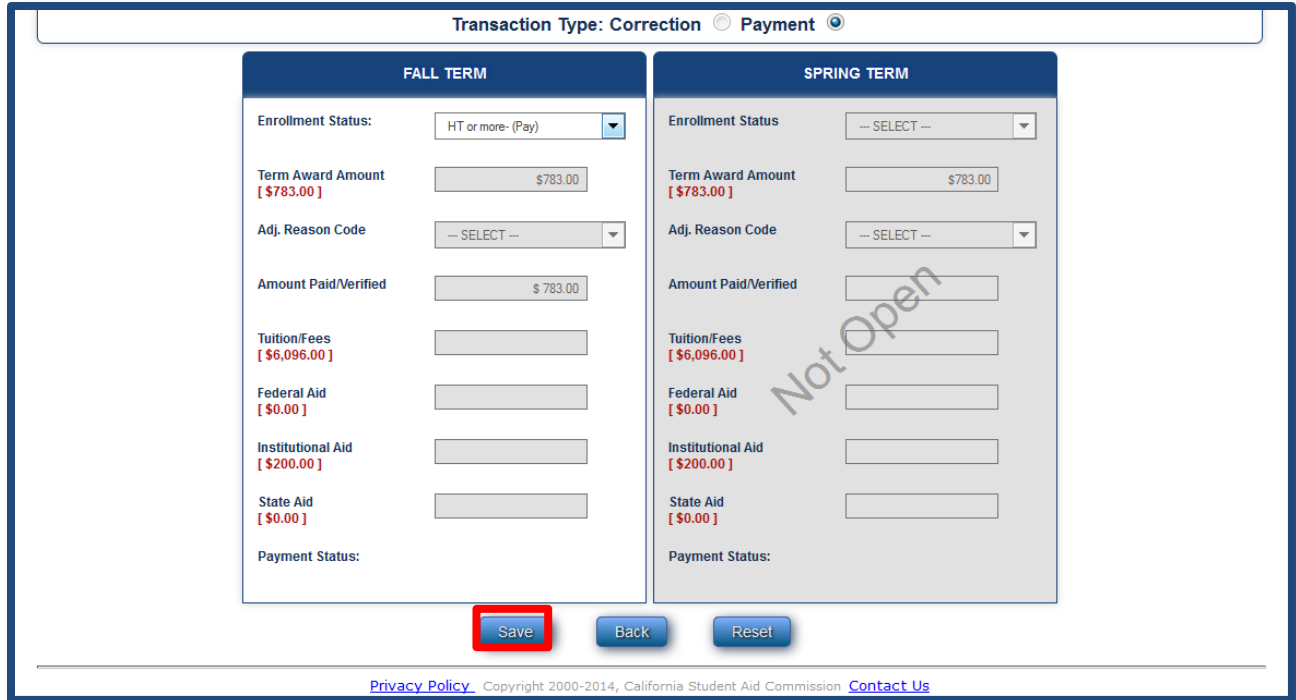
Save Back Reset

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Screen 9 – MCS – Roster Menu – Middle Class Scholarship – School Roster – Online Payment Roster

20. Once the student's **Enrollment Status** has been selected, the system will automatically populate the other fields under **Fall Term**.

21. If the **Enrollment Status** is correct, click on the **Save** button to process any payments.



Transaction Type: Correction ☐ Payment ☒

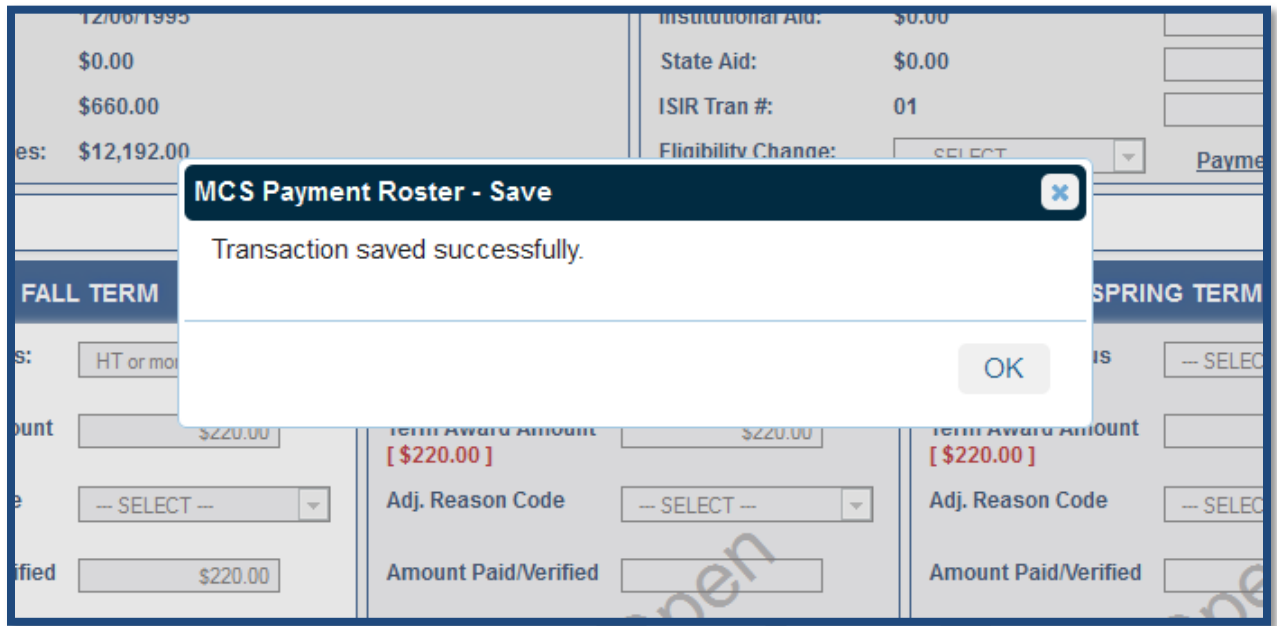
FALL TERM	SPRING TERM
Enrollment Status: HT or more- (Pay)	Enrollment Status: -- SELECT --
Term Award Amount [\$783.00]	Term Award Amount [\$783.00]
Adj. Reason Code: -- SELECT --	Adj. Reason Code: -- SELECT --
Amount Paid/Verified: \$ 783.00	Amount Paid/Verified:
Tuition/Fees [\$6,096.00]	Tuition/Fees [\$6,096.00]
Federal Aid [\$0.00]	Federal Aid [\$0.00]
Institutional Aid [\$200.00]	Institutional Aid [\$200.00]
State Aid [\$0.00]	State Aid [\$0.00]
Payment Status:	Payment Status:

Save Back Reset

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Screen 10 – MCS – Roster Menu – Middle Class Scholarship – School Roster – Online Payment Roster

22. After you click **Save**, the systems will generate a pop-up box confirming the transaction has been saved. Click "OK" to proceed.



The screenshot displays the MCS Payment Roster interface. A modal dialog titled "MCS Payment Roster - Save" is centered on the screen, indicating that a transaction has been saved successfully. The background interface shows a table with columns for "FALL TERM" and "SPRING TERM". Each term column contains fields for "Term Award Amount" (displayed as [\$220.00]), "Adj. Reason Code" (a dropdown menu), and "Amount Paid/Verified". A large, diagonal "DRAFT" watermark is visible across the lower portion of the interface.

23. If you made a mistake and would like to delete the transaction, click on the **Delete** button.

The delete button will only appear on a roster where a transaction has been submitted, but not reconciled. At the bottom of the "Fall Term", this is indicated by the Payment Status: "Not Reconciled" in red lettering.

MCS - Roster MCS Display Roster

Middle Class Scholarship - Online Payment Roster

Demographic Information	Annual Data
SMITH, ALICIA R	
CSAC ID: 101308126	Open Terms: Fall
SSN No: XXX - XX - 8181	Total Income: \$140,773.00
DOB: 12/06/1995	Federal Aid: \$0.00
Cal Grant Award: \$0.00	Institutional Aid: \$0.00
Annual Award: \$660.00	State Aid: \$0.00
Annual Tuition/Fees: \$12,192.00	ISIR Tran #: 01
	Eligibility Change: -- SELECT --
	Payment History

Transaction Type: Correction Payment

[Delete](#)

FALL TERM	WINTER TERM	SPRING TERM
Enrollment Status: HT or more- (Pay)	Enrollment Status: -- SELECT --	Enrollment Status: -- SELECT --
Term Award Amount: \$220.00	Term Award Amount: \$220.00	Term Award Amount: \$220.00
Adj. Reason Code: -- SELECT --	Adj. Reason Code: -- SELECT --	Adj. Reason Code: -- SELECT --
Amount Paid/Verified: \$220.00	Amount Paid/Verified:	Amount Paid/Verified:
Tuition/Fees: \$4,064.00	Tuition/Fees: \$4,064.00	Tuition/Fees: \$4,064.00
Federal Aid: \$0.00	Federal Aid: \$0.00	Federal Aid: \$0.00
Institutional Aid: \$0.00	Institutional Aid: \$0.00	Institutional Aid: \$0.00
State Aid: \$0.00	State Aid: \$0.00	State Aid: \$0.00
Payment Status: Not Reconciled	Payment Status: Not Reconciled	Payment Status: Not Reconciled

[Save](#)
[Back](#)
[Reset](#)

24. The system will generate a confirmation message. Click **OK** to proceed.

MCS Roster - Delete Transaction
✕

Are you sure you want to delete the transaction

OK
Cancel

Screen 11 – MCS – Roster Menu – Middle Class Scholarship – School Roster – Online Payment Roster – Confirmation Message

25. The system will return you to the *Middle Class Scholarship – School Roster* screen.

26. Selecting the "Reset" button will delete any data that you have entered, prior to saving.

Demographic Information		Annual Data	
SMITH, ALICIA R		Open Terms:	Fall
CSAC ID:	101308126	Total Income:	\$140,773.00
SSN No:	XXX - XX - 8181	Federal Aid:	\$0.00
DOB:	12/06/1995	Institutional Aid:	\$0.00
Cal Grant Award:	\$0.00	State Aid:	\$0.00
Annual Award:	\$660.00	ISIR Tran #:	01
Annual Tuition/Fees:	\$12,192.00	Eligibility Change:	-- SELECT --
		Payment History	

Transaction Type: ☐ Correction ☒ Payment

FALL TERM	WINTER TERM	SPRING TERM
Enrollment Status: HT or more- (Pay)	Enrollment Status: -- SELECT --	Enrollment Status: -- SELECT --
Term Award Amount: \$220.00	Term Award Amount: \$220.00	Term Award Amount: \$220.00
Adj. Reason Code: -- SELECT --	Adj. Reason Code: -- SELECT --	Adj. Reason Code: -- SELECT --
Amount Paid/Verified: \$ 220.00	Amount Paid/Verified:	Amount Paid/Verified:
Tuition/Fees: \$4,064.00	Tuition/Fees: \$4,064.00	Tuition/Fees: \$4,064.00
Federal Aid: \$0.00	Federal Aid: \$0.00	Federal Aid: \$0.00
Institutional Aid: \$0.00	Institutional Aid: \$0.00	Institutional Aid: \$0.00
State Aid: \$0.00	State Aid: \$0.00	State Aid: \$0.00
Payment Status: Not Reconciled	Payment Status: Not Reconciled	Payment Status: Not Reconciled

Save Back **Reset**

27. Selecting the "Back" button will return you to the list of students you previously searched for from the MCS School Roster screen.

Transaction Type: ☒ Correction ☐ Payment

FALL TERM	WINTER TERM	SPRING TERM
Enrollment Status: <input type="text" value="-- SELECT --"/>	Enrollment Status: <input type="text" value="-- SELECT --"/>	Enrollment Status: <input type="text" value="-- SELECT --"/>
Term Award Amount <input type="text" value="\$220.00"/> [\$220.00]	Term Award Amount <input type="text" value="\$220.00"/> [\$220.00]	Term Award Amount <input type="text" value="\$220.00"/> [\$220.00]
Adj. Reason Code: <input type="text" value="-- SELECT --"/>	Adj. Reason Code: <input type="text" value="-- SELECT --"/>	Adj. Reason Code: <input type="text" value="-- SELECT --"/>
Amount Paid/Verified <input type="text"/>	Amount Paid/Verified <input type="text"/>	Amount Paid/Verified <input type="text"/>
Tuition/Fees <input type="text"/> [\$4,064.00]	Tuition/Fees <input type="text"/> [\$4,064.00]	Tuition/Fees <input type="text"/> [\$4,064.00]
Federal Aid <input type="text"/> [\$0.00]	Federal Aid <input type="text"/> [\$0.00]	Federal Aid <input type="text"/> [\$0.00]
Institutional Aid <input type="text"/> [\$0.00]	Institutional Aid <input type="text"/> [\$0.00]	Institutional Aid <input type="text"/> [\$0.00]
State Aid <input type="text"/> [\$0.00]	State Aid <input type="text"/> [\$0.00]	State Aid <input type="text"/> [\$0.00]
Payment Status: Not Reconciled	Payment Status: Not Reconciled	Payment Status: Not Reconciled

Save Back Reset

MCS REPORT DOWNLOAD GUIDELINES

2.1 INTRODUCTION

After the first week of the initial reporting period for the **MCS Payment File**, the **MCS Payment Activity Report** will be available to view and download for each successfully uploaded file. The report provides a summary of the data processed in their **MCS Payment file**. Each file is processed on a weekly basis and once the processing is complete the **MCS Payment Activity Report** will be made available.

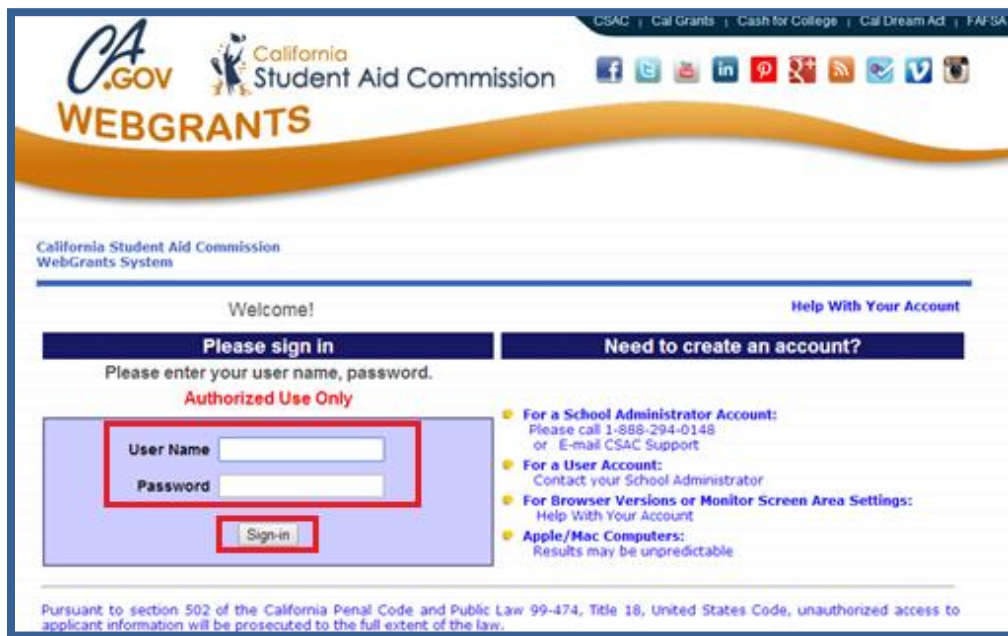
2.1.1 ASSUMPTIONS:

To complete the process of downloading the **MCS Payment Summary** report, the following assumptions have been made:

- The individual retrieving the report has a valid WebGrants user account.
- The individual retrieving the report has access to the MCS menu.
- A valid **MCS Payment File** has been uploaded for the institution.
- The valid **MCS Payment File** was uploaded a week prior to attempting to retrieve the report.

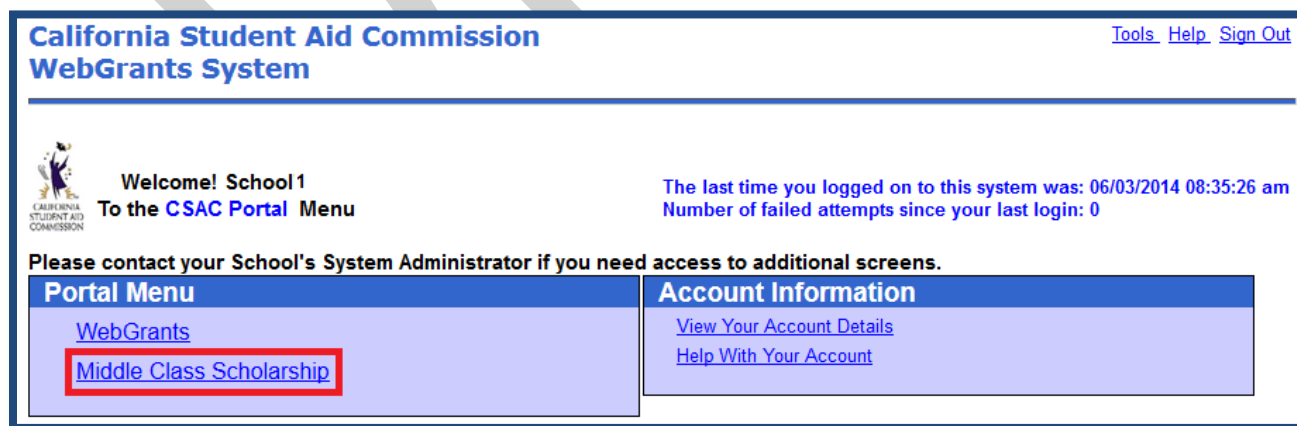
2.2 DOWNLOADING THE MCS STUDENT AWARD SUMMARY REPORT:

1. Navigate to the [WebGrants System](#) login page.
 - This is the entry point through which all authorized user can access the WebGrants application.
2. Enter the **User Name** and **Password** and select the **Sign-in** button.



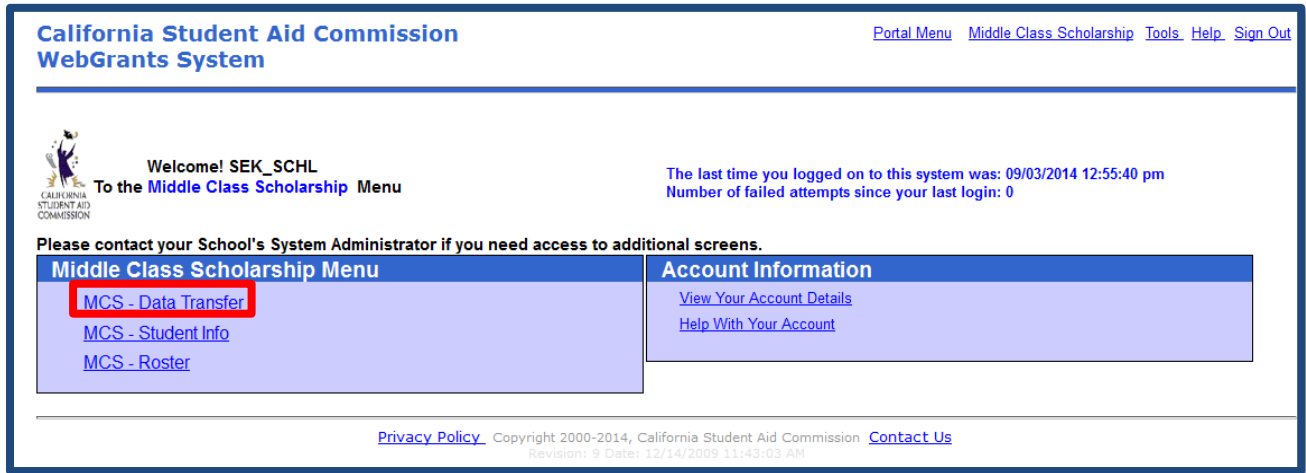
Screen 1 – WebGrants System – Login

3. The system will display the **CSAC Portal Menu** screen upon successfully authenticating the login credentials.
 - **Note:** Depending on the profile authorization there may be more options available in the CSAC Portal Menu.
4. Select the [Middle Class Scholarship](#) menu option.



Screen 2 – WebGrants System – CSAC Portal Menu

5. The system will display the ***Middle Class Scholarship Menu*** screen.
6. Select the ***MCS – Data Transfer*** menu selection.



California Student Aid Commission
WebGrants System

[Portal Menu](#) [Middle Class Scholarship](#) [Tools](#) [Help](#) [Sign Out](#)

Welcome! SEK_SCHL
To the **Middle Class Scholarship Menu**

The last time you logged on to this system was: 09/03/2014 12:55:40 pm
Number of failed attempts since your last login: 0

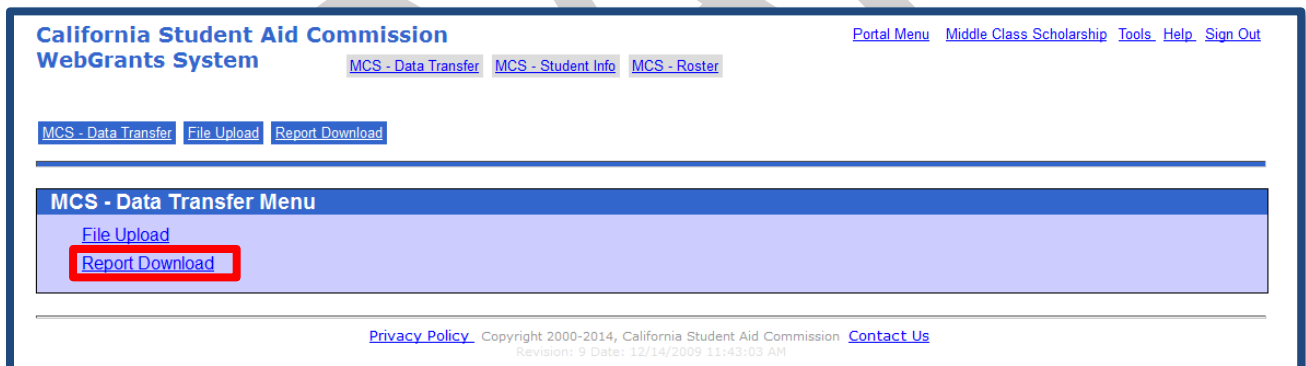
Please contact your School's System Administrator if you need access to additional screens.

Middle Class Scholarship Menu	Account Information
MCS - Data Transfer MCS - Student Info MCS - Roster	View Your Account Details Help With Your Account

[Privacy Policy](#) Copyright 2000-2014, California Student Aid Commission [Contact Us](#)
Revision: 9 Date: 12/14/2009 11:43:03 AM

Screen 3 – WebGrants System – Middle Class Scholarship Menu

7. The system will display the ***MCS – Data Transfer Menu*** screen.
8. Select the ***Report Download*** menu selection.



California Student Aid Commission
WebGrants System

[Portal Menu](#) [Middle Class Scholarship](#) [Tools](#) [Help](#) [Sign Out](#)

[MCS - Data Transfer](#) [MCS - Student Info](#) [MCS - Roster](#)

[MCS - Data Transfer](#) [File Upload](#) [Report Download](#)

MCS - Data Transfer Menu
File Upload Report Download

[Privacy Policy](#) Copyright 2000-2014, California Student Aid Commission [Contact Us](#)
Revision: 9 Date: 12/14/2009 11:43:03 AM

Screen 4 – MCS - Data Transfer Menu

9. The system will display the **MCS Report Download** screen
10. Enter the **School ID** and select the **File Type** from the drop down menu.
 - **Note:** The **Academic Year** field is defaulted to the current year, the **Month** field is defaulted to the current month and the **Media Type** is defaulted to **Data File**.
11. Select the **Retrieve** button.

Report Download

▪ To select a report, choose the file type and click retrieve.

▪ To download the specific report, click the download button.

School ID

Acad Year 2014 - 2015

File Type Roster File Repor

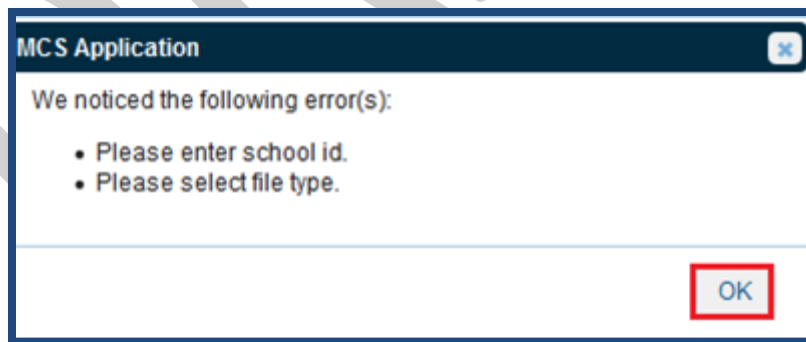
Month September

Media Data File

Retrieve

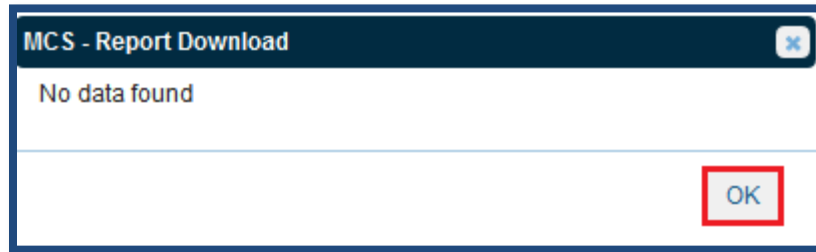
Screen 14 – MCS – Report Download Screen

12. If the **School ID** and **File Type** are not selected the system will display an exception message.
13. Select the **OK** button.
14. The system will display the **MCS Report Download** screen.



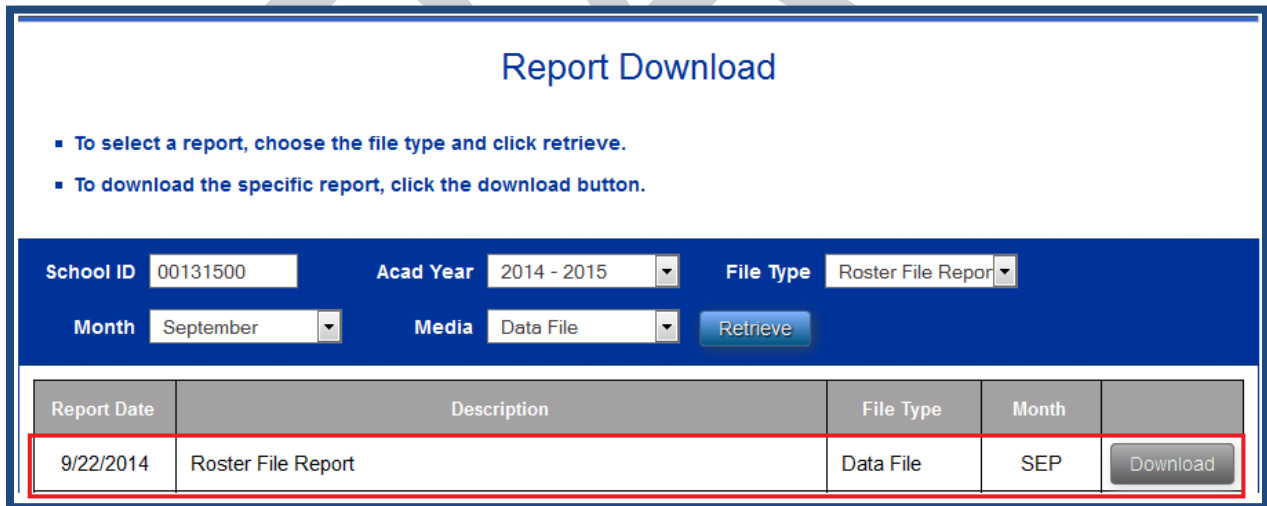
Screen 15 – MCS – Report Download –Exception Message

15. If there is no data to report, the system will display an exception message.
16. Select the **OK** button.
17. The system will display the **MCS Report Download** screen.



Screen 16 – MCS – Report Download – No Data Found Exception Message

18. If there is data to report and the **Report Download** field entries are valid, the system will display the **MCS Roster File Report** in an embedded panel.
 - **Note:** If multiple files were submitted, there will be multiple reports contained within the embedded panel which will be sorted by *Report Date*.
19. To review the content in the report select the **Download** button.



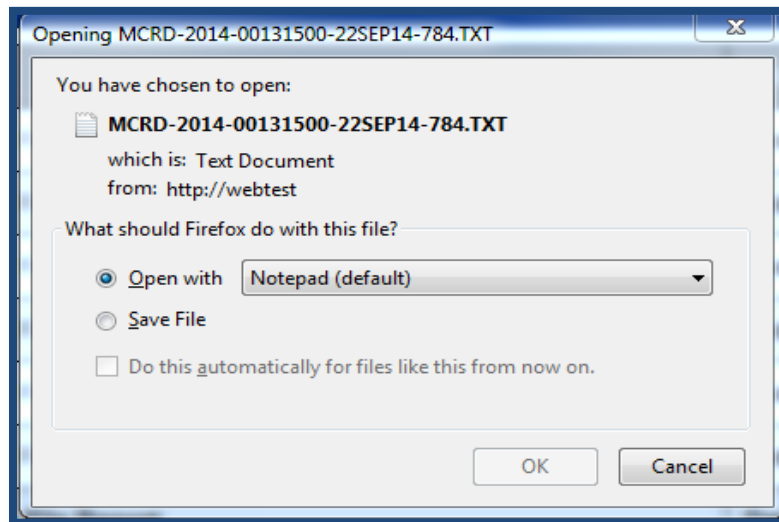
The screenshot shows the "Report Download" screen. It includes instructions: "To select a report, choose the file type and click retrieve." and "To download the specific report, click the download button." Below these are search filters: School ID (00131500), Acad Year (2014 - 2015), File Type (Roster File Report), Month (September), and Media (Data File). A "Retrieve" button is next to the Media filter. Below the filters is a table with the following data:

Report Date	Description	File Type	Month	
9/22/2014	Roster File Report	Data File	SEP	Download

Screen 17 – MCS – Report Download – MCS Roster File Report

20. The system will display the **MCS Roster File Report** dialogue box.

21. Select the **OK** button.

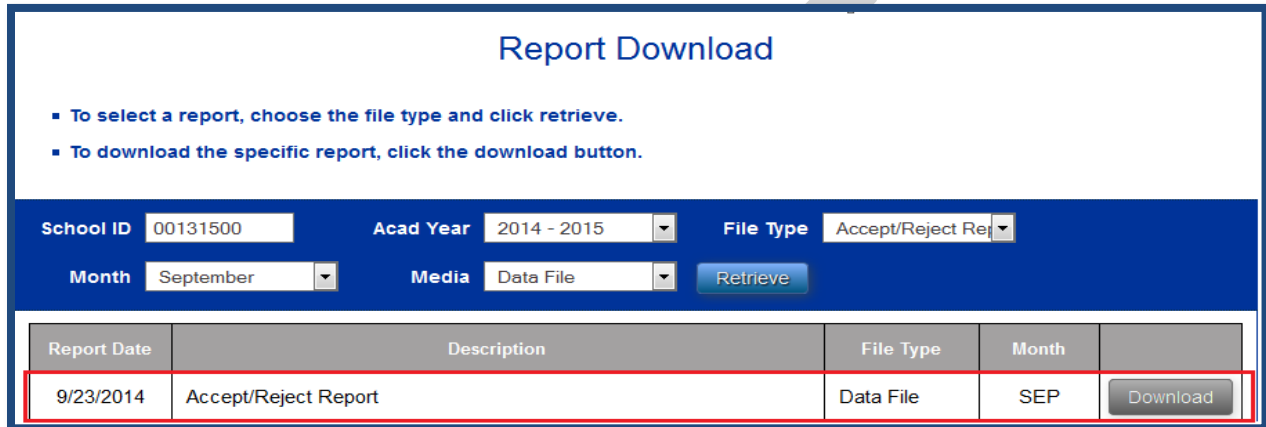


Screen 18 – MCS - Report Download – MCS Roster File Dialogue Box

22. The system will display the **MCS Roster File Report** which provides the summary details of the records submitted in the **MCS Payment File**.

- **Note:** The **MCS Roster File Report** is only available in the Data File format.

23. The **MCS Accept/Reject Report** is only available in the Data File format. The **MCS Accept/Reject Report** will display the most recent transactions that have been processed by the Commission.



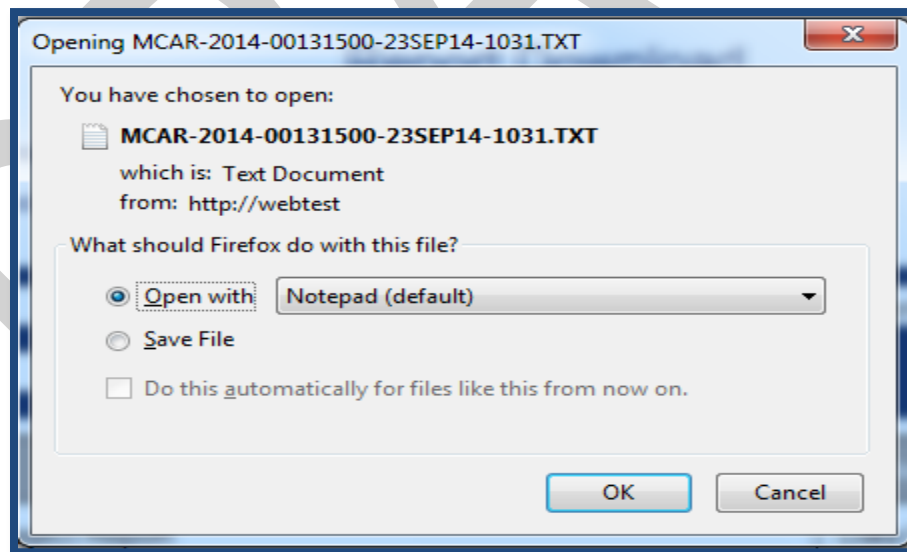
Report Download

- To select a report, choose the file type and click retrieve.
- To download the specific report, click the download button.

School ID: 00131500 Acad Year: 2014 - 2015 File Type: Accept/Reject Rej
Month: September Media: Data File Retrieve

Report Date	Description	File Type	Month	
9/23/2014	Accept/Reject Report	Data File	SEP	Download

24. The system will display the **MCS Roster File Report** dialogue box.



25. Select the **OK** button.

26. The **MCS Monthly Payment Activity Report** is only available in the Report format. The **MCS Accept/Reject Report** will display the most recent payment transactions that have been processed by the Commission.

Report Download

- To select a report, choose the file type and click retrieve.
- To download the specific report, click the download button.

School ID

Acad Year

File Type

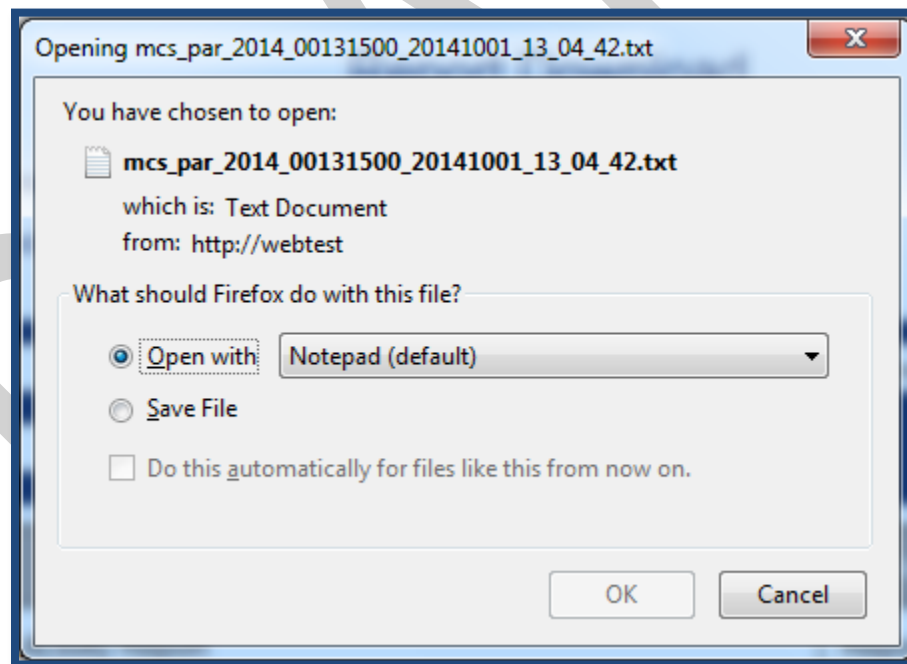
Month

Media

[Retrieve](#)

Report Date	Description	File Type	Month	
9/23/2014	Payment Activity Report	Report File	SEP	Download

27. The system will display the **MCS Monthly Payment Activity Report** dialogue box.



28. Select the **OK** button.

END

MCS CORRECTION PROCESS GUIDELINES

3.1 INTRODUCTION

The MCS Correction process is required to be used to update student award information. Due to the limited funding available, CSAC must re-calculate each student's award and provide any revised award values to the campus. The process of submitting corrections will allow CSAC to maintain and monitor the funding level each year, and ensure the program is not over subscribed. The two methods that will be available to submit corrections are the batch file upload process and the on-line roster functionality.

3.2 ASSUMPTIONS:

To complete the process of submitting MCS Corrections, the following assumptions have been made:

- The individual submitting corrections has a valid WebGrants user account.
- The individual submitting corrections has access to the MCS menu.
- A valid **MCS Payment File** has been uploaded for the institution.
- The valid **MCS Payment File** was uploaded a week prior to attempting to retrieve the report.

3.3 MCS CORRECTION PROCESS GENERAL GUIDELINES:

When a student has been awarded the MCS, but new information is available that may affect the student's eligibility or award, the campus must follow the correction process in order to have CSAC re-calculate that student's award. In general, the following hierarchy of changes should be applied:

- 1) In general, annual level changes, such as a student's total income, should be submitted before term level changes or payment transactions.
- 2) In general, term level changes, such as a student's tuition and fees, should be submitted before payment transactions.
 - a. Term level corrections can only be made for terms that are currently open. For example, in October 2014, a campus will only be able to submit changes for Fall 2014.
- 3) In general, payment transactions should only be applied once a student's award information has been verified as accurate.

Campus staff may utilize either of the following methods to submit corrections to awarded MCS students:

- 1) Batch File Upload Process
- 2) On-line Roster Corrections

Both methods will be reconciled during the week-end processing. Changes will be available the following Monday.

3.4.1 MCS CORRECTION BATCH FILE UPLOAD:

Uploading corrected records for MCS follows the same process as 1.3 – Uploading the MCS Payment File. When uploading corrections, a campus will use the “MCS Payment File” to do so. Within the file record layout, field 42 would be changed from a “P” – for payment to a “C” – for correction.

General Rules for uploading corrections via the payment file:

- 1) Correction and Payment transactions may be submitted within the same file, **but not for the same record.**
- 2) When submitting a correction for a student, you may only submit Annual level corrections **OR** Term level corrections within the same file.
 - a. When possible, please follow the correction process hierarchy to determine which correction to submit first (3.3).
 - b. Multiple term level corrections are allowed within the same week.
- 3) Corrections may only be submitted for “open” terms.
 - a) Fall term opened on October 6, 2014
 - b) Winter and Spring terms opened on November 3, 2014.

3.4.2 CORRECTION FIELDS:

When submitting corrections via a batch file upload, the following fields may be modified to indicate a student’s MCS award should be re-calculated:

Annual Level Changes – should be performed when the campus has updated information on total income, federal financial aid, institutional aid and state aid that could potentially impact the student’s MCS award eligibility and amount. When annual level corrections are submitted, CSAC will re-calculate the student’s MCS award during the weekly process and update the MCS roster accordingly the following Monday.

Field #11 – Total Income: only provide a value in this field if you are submitting a correction to previously reported Total Income. In addition to submitting a value in Field #11, a value of “3” should be submitted in field 41 (noting a change in eligibility, and a value of “C” should be reported in field 42 (noting the Transaction Type as a “correction”).

Following the processing of the new total income value, the student will be re-evaluated for their MCS award. If the student remains eligible, and their award value has gone up or down, new information will be

available to the campus on the following Monday. If the change in total income results in a student no longer being eligible for their MCS award, the student will be removed from the roster.

Field #12 – Student’s Federal Aid: only provide a value in this field if you are submitting a correction to previously reported Federal Aid. In addition to submitting a value in Field #12, a value of “3” should be submitted in field 41 (noting a change in eligibility, and a value of “C” should be reported in field 42 (noting the Transaction Type as a “correction”).

Following the processing of the new student’s Federal Aid, the student will be re-evaluated for their MCS award. If the student remains eligible, and their award value has gone up or down, new information will be available to the campus on the following Monday. If the change in Federal Aid results in a student no longer being eligible for their MCS award, the student will be removed from the roster.

Field #13 – Student’s School Grants and Fee Waivers: only provide a value in this field if you are submitting a correction to previously reported School Grants and Fee Waivers. In addition to submitting a value in Field #13, a value of “3” should be submitted in field 41 (noting a change in eligibility, and a value of “C” should be reported in field 42 (noting the Transaction Type as a “correction”).

Following the processing of the new student’s School Grants and Fee Waivers, the student will be re-evaluated for their MCS award. If the student remains eligible, and their award value has gone up or down, new information will be available to the campus on the following Monday. If the change in School Grants and Fee Waivers results in a student no longer being eligible for their MCS award, the student will be removed from the roster.

Field #14 – Student’s State Aid: only provide a value in this field if you are submitting a correction to previously reported State Aid. In addition to submitting a value in Field #14, a value of “3” should be submitted in field 41 (noting a change in eligibility, and a value of “C” should be reported in field 42 (noting the Transaction Type as a “correction”).

Following the processing of the new student’s State Aid, the student will be re-evaluated for their MCS award. If the student remains eligible, and their award value has gone up or down, new information will be available to the campus on the following Monday. If the change in State Aid results in a student no longer being eligible for their MCS award, the student will be removed from the roster.

Field #41 – Eligibility Change (for Academic Year): this field should only be used when making corrections at an annual level. If there is a value provided in this field, then the Transaction Type, field 42, must indicate “C”.

If the data value submitted is 1, 2, or 4 (Post Bacc, SAP, or Not Enrolled) and a payment exists for this student, the school is responsible for determining whether or not the student should have received all or part of the payment. The school shall address the payment change PRIOR to submitting the annual level

“Eligibility Change”. By submitting one of these values, the student is considered no longer eligible for the MCS award consideration unless other information is received by CSAC. The student’s MCS award will be withdrawn, and the student will be removed from the roster.

If the data value submitted is 3, (Eligibility) then the school is required to provide one or more values in fields 11 through 14; and CSAC will use that new information to recalculate the student’s award. If no new value is provided in one of the additional fields, then the recalculation will be performed using the existing values previously submitted.

Annual level corrections when payments are reconciled

1. If a school submits a **data value of 1, 2, or 4**, (Post Bacc., SAP, or Not Enrolled) and a payment exists for this student, the school is responsible for determining whether or not the student should have received all or part of the payment. The school must address the payment change **PRIOR** to submitting the annual level “Eligibility Change”.
2. If the **data value submitted is a 3**, (Eligibility) and a payment exists for this student, the award will be recalculated and the school will be required to recertify the payment amount. **NOTE:** This includes records where the eligibility change or recalculation process results in the student no longer being eligible for MCS Award consideration. In these cases, the student’s MCS award will be set to \$0.00, and the school will be required to recertify the \$0.00 payment amount. After this recertification takes place, then the student will be removed from the school’s MCS payment-roster.

Term Level Changes: should be performed when the campus needs to update information on a specific term’s tuition, federal financial aid, institutional aid and state aid. CSAC will re-calculate the student’s MCS award for that term only during the weekly process and update the MCS roster accordingly the following Monday. After the re-calculation, the term amounts may not equal since a specific term was re-evaluated. However, the sum of all terms amounts will equal the annual MCS award amount.

Field #22/29/36 – Fall/Winter/Spring Adjustment Reason Code: field 22/29/36 is used to indicate term adjustment reasons. Valid content includes numeric values 1-6.

If the school provides a value of 3, or 4 in this field, then a value of “C” must also be submitted in field 42, (Transaction Type) of this file. If not, then the record will be rejected. If selecting 3 or 4, values must also be reported in fields 23 through 26. CSAC will use the new reported information to recalculate the student’s award for the applicable term. The Annual Award Amount will be adjusted to reflect the new term amount.

If the school provides a value of 1, 2, or 5 in this field, then a value of “P” must also be submitted in field 42, (Transaction Type) of this file. If not, then the record will be rejected.

If the school submits a value of 1 or 2, (Post Bacc. or SAP) then the school must also submit a value of zero in field 21, (Fall MCS Award Payment) indicating that the student should not be paid for the Fall term, but should remain on their roster.

If a payment has already been made for this student, the difference between the previous payment amount and the “zero” payment amount will be taken into consideration during the school reconciliation process.

Field #23/30/37 – Fall/Winter/Spring Tuition/Fee Amount: used to adjust a student’s term specific Tuition/Fee amount.

CSAC will provide a value in this field based on the reported tuition and fees for UC and CSU campuses. The annual value is then divided by the applicable term amounts specific to your campus.

If a different value is reported in this field by the campus, it cannot exceed the annual Tuition/Fee amount. When reporting changes to Tuition/Fee amounts, you must also indicate a “C” in field 42 to indicate the transaction is a correction. In addition to field 42, an adjustment reason code of 3 or 4 (Eligibility or Fees) must be indicated in field 22 (for the fall term).

CSAC will use the new values reported to recalculate the student’s MCS award.

Field #24/31/38 – Fall/Winter/Spring Federal Aid Amount: used to adjust a student’s term specific Federal Aid amount.

CSAC will provide a value in this field (the annual Federal Aid amount divided by the number of terms).

If a different value is reported in this field by the campus, it cannot exceed the annual Federal Aid amount. When reporting changes to term Federal Aid amounts, you must also indicate a “C” in the field 42 to indicate the transaction is a correction. In addition to field 42, an adjustment reason code of 3 (Eligibility) must also be reported in field 22 (for the fall term).

CSAC will use the new values reported to recalculate the student’s MCS award.

Field #25/32/39 – Fall/Winter/Spring School Aid Amount: used to adjust a student’s term specific School Aid amount.

CSAC will provide a value in this field (the annual School Aid Amount divided by the number of terms).

If a different value is reported in this field by the campus, it cannot exceed the annual School Aid amount. When reporting changes to term School Aid amounts, you must also indicate a “C” in the field 42 to indicate the transaction is a correction. In addition to field 42, an adjustment reason code of 3 (Eligibility) must also be reported in field 22 (for the fall term).

CSAC will use the new values reported to recalculate the student’s MCS award.

Field #26/33/40 – Fall/Winter/Spring State Aid Amount (Exclude Cal Grant): used to adjust a student’s term specific State Aid amount (excluding Cal Grant).

CSAC will provide a value in this field (the annual State Aid amount divided by the number of terms).

If a different value is reported in this field by the campus, it cannot exceed the annual State Aid amount.

When reporting changes to term State Aid amounts, you must also indicate a “C” in the field 42 to indicate the transaction is a correction. In addition to field 42, an adjustment reason code of 3 (Eligibility) must also be reported in field 22 (for the fall term).

CSAC will use the new values reported to recalculate the student’s MCS awards.

NOTE: As a reminder, when reporting State Aid, at the annual or term level, Cal Grant awards should be EXCLUDED from any value reported by the campus. CSAC will identify if a student has a Cal Grant and factor that in to their award calculation.

Term level corrections when payments are reconciled

If the **data value submitted is 3 or 4**, (Eligibility, or Fees) and a payment exists for the student, the term award will be recalculated and the school will be required to recertify the payment amount.

NOTE: This includes records where the eligibility/fee change recalculation process results in an MCS Term Award amount = \$0.00. In the instances where this particular term is the only term that the student is attending, the student’s annual MCS award will also be set to \$0.00, and the school will be required to recertify the \$0.00 payment amount. After this recertification takes place, the student will be removed from the school’s MCS payment-roster

3.4.1 MCS CORRECTION ON-LINE ROSTER:

All correction transactions can be handled through either the batch upload process, or individually utilizing the MCS Online Payment Roster. Please reference Attachment 1 for a view of the on-line roster and the corresponding field numbers from the payment file.

Below is a sample of making an Annual Level change (Total Income) and a Term Level Change (increased Tuition/Fees). For more descriptions of potential correction and/or payment scenarios, please reference Attachment 2 for a detailed description and the corresponding steps to complete each correction.

3.4.2 ASSUMPTIONS:

To complete the MCS Correction process the following assumptions have been made:

- The reporting individual has a valid WebGrants user account
- The reporting individual has access to the MCS menu
- The reporting individual has valid MCS Data to report

For detailed log-in instructions, please reference back to section 1.3.

3.4.3 CORRECTION PROCESS EXAMPLES:

Example 1: Adjusting a student's Total Income via the MCS On-line Roster (ANNUAL LEVEL CHANGE)

1. From the MCS Roster section, select the student you would like to report a correction for.

[MCS - Roster](#)
[MCS.Display Roster](#)

Middle Class Scholarship - School Roster

- Enter the School ID for Search.
- Enter the SSN/CSAC ID or First Name or Last Name for to refine the Search results.
- Partial first name with minimum 3 characters.
- Partial last name with minimum 2 characters.

School ID
Acad Year
Search ID

First Name
Last Name

SSN	CSAC ID	Last Name	First Name	DOB
603565987	104814666	ALCARAZ-LOPEZ	REBECA	03/26/1992
200015757	101308153	DUKE	ERNEST	07/12/1958
200054489	101308157	ELLIS	ANITA	11/22/1991
200043794	101308156	FELTON	HELEN	01/21/1993
200038593	101308155	GALLEGOS	PEGGY	05/23/1993
200075749	101308161	GRANT	NGOC	06/18/1991
200093268	101308162	HANSEN	EDWARD	06/24/1993
200058263	101308158	HOEY	LOREN	02/07/1996
200022266	101308154	MCLAUGHLIN	GEORGE	01/22/1967
200064842	101308159	RHODES	BRANDY	06/26/1993
200034549	101308243	SANCHEZ	MICHAEL	11/03/1996
200015699	101308152	SIMPSON	JESSIE	06/03/1969

1
2

2. From the Online Payment Roster screen, select the following criteria:

- a. "Correction" radio button
- b. "Eligibility" from the "Eligibility Change" dropdown box in the "Annual Data" section
- c. Enter the student's new Total Income in the "Total Income" field
- d. If applicable, report the ISIR transaction number associated with the correction

*Note: When reporting an ISIR transaction number change, the original ISIR transaction that CSAC used to award the student will remain displayed on the Annual Data. CSAC will store, internally, the new transaction number as reported by the campus.

- e. Click the "Save" radio button

Middle Class Scholarship - Online Payment Roster

Demographic Information		Annual Data	
DUKE, ERNEST H		Open Terms: Fall, Winter, Spring	
CSAC ID: 101308153		Total Income: \$100,000.00	\$ 125,000.00
SSN No: XXX - XX - 5757		Federal Aid: \$280.00	<input type="text"/>
DOB: 07/12/1958		Institutional Aid: \$0.00	<input type="text"/>
Cal Grant Award: \$0.00		State Aid: \$0.00	<input type="text"/>
Annual Award: \$666.00		ISIR Tran #: 01	3
Annual Tuition/Fees: \$5,472.00		Eligibility Change: Eligibility	Payment History

Transaction Type: Correction ☒ Payment ☐

FALL TERM	SPRING TERM
Enrollment Status: -- SELECT --	Enrollment Status -- SELECT --
Term Award Amount \$333.00 [\$333.00]	Term Award Amount \$333.00 [\$333.00]
Adj. Reason Code -- SELECT --	Adj. Reason Code -- SELECT --
Amount Paid/Verified 	Amount Paid/Verified
Tuition/Fees [\$2,736.00]	Tuition/Fees [\$2,736.00]
Federal Aid [\$140.00]	Federal Aid [\$140.00]
Institutional Aid [\$0.00]	Institutional Aid [\$0.00]
State Aid [\$0.00]	State Aid [\$0.00]
Payment Status: Not Reconciled	Payment Status: Not Reconciled

Save
Back
Reset

3. A pop up box will confirm that your transaction has been saved.
 - a. Once a transaction has been saved, the newly reported data will be reflected the following Monday after CSAC completes the weekly processing of files.
4. If after submitting a transaction, you would like to delete the submission, you can do so by re-selecting the "Correction" radio button, then selecting the "Delete" radio button.

Middle Class Scholarship - Online Payment Roster

Demographic Information		Annual Data	
DUKE, ERNEST H		Open Terms:	Fall, Winter, Spring
CSAC ID:	101308153	Total Income:	\$100,000.00 <input style="width: 100px;" type="text" value="\$125,000.00"/>
SSN No:	XXX - XX - 5757	Federal Aid:	\$280.00 <input style="width: 100px;" type="text"/>
DOB:	07/12/1958	Institutional Aid:	\$0.00 <input style="width: 100px;" type="text"/>
Cal Grant Award:	\$0.00	State Aid:	\$0.00 <input style="width: 100px;" type="text"/>
Annual Award:	\$666.00	ISIR Tran #:	01 <input style="width: 50px;" type="text" value="3"/>
Annual Tuition/Fees:	\$5,472.00	Eligibility Change:	<input style="width: 100px;" type="text" value="Eligibility"/> Payment History

Transaction Type: ☒ Correction ☐ Payment

FALL TERM

SPRING TERM

5. All payments and transactions will process at the end of each week. Any newly reported data will be reflected in student records the following Monday.

Example 2: increasing/decreasing a student's tuition/fees for a specific term (TERM LEVEL CHANGE)

1. From the MCS School Roster screen, select the student you wish to make a correction for. Once selected, you will land on the MCS – Online Payment Roster screen.
 - a. Select the "Correction" radio button
 - b. Under the "Adj. Reason Code" drop down (in the term section), select "Fees"
 - c. Under "Tuition/Fees", type in the new Tuition/Fee amount for the student
 - i. In this example, we are making corrections for both fall and spring simultaneously (this can only be done when multiple terms are "open" – shown in the Annual Data section under "Open Terms")
 - d. Click the "Save" radio button.

Middle Class Scholarship - Online Payment Roster

Demographic Information		Annual Data	
DUKE, ERNEST H		Open Terms: Fall, Winter, Spring	
CSAC ID:	101308153	Total Income:	\$100,000.00 <input style="width: 100px;" type="text"/>
SSN No:	XXX - XX - 5757	Federal Aid:	\$280.00 <input style="width: 100px;" type="text"/>
DOB:	07/12/1958	Institutional Aid:	\$0.00 <input style="width: 100px;" type="text"/>
Cal Grant Award:	\$0.00	State Aid:	\$0.00 <input style="width: 100px;" type="text"/>
Annual Award:	\$666.00	ISIR Tran #:	01 <input style="width: 100px;" type="text"/>
Annual Tuition/Fees:	\$5,472.00	Eligibility Change:	<input type="text" value="--- SELECT ---"/> <input style="width: 20px;" type="button" value="v"/> Payment History

Transaction Type: Correction ☒ Payment ☐

FALL TERM	SPRING TERM
Enrollment Status: <input type="text" value="--- SELECT ---"/>	Enrollment Status: <input type="text" value="--- SELECT ---"/>
Term Award Amount [\$333.00] <input style="width: 100px;" type="text" value="\$333.00"/>	Term Award Amount [\$333.00] <input style="width: 100px;" type="text" value="\$333.00"/>
Adj. Reason Code Fees <input style="width: 100px;" type="text"/>	Adj. Reason Code Fees <input style="width: 100px;" type="text"/>
Amount Paid/Verified <input style="width: 100px;" type="text" value="\$ 0.00"/>	Amount Paid/Verified <input style="width: 100px;" type="text" value="\$ 0.00"/>
Tuition/Fees [\$2,736.00] \$ 3,000.00 <input style="width: 100px;" type="text"/>	Tuition/Fees [\$2,736.00] \$ 3,000.00 <input style="width: 100px;" type="text"/>
Federal Aid [\$140.00] <input style="width: 100px;" type="text"/>	Federal Aid [\$140.00] <input style="width: 100px;" type="text"/>
Institutional Aid [\$0.00] <input style="width: 100px;" type="text"/>	Institutional Aid [\$0.00] <input style="width: 100px;" type="text"/>
State Aid [\$0.00] <input style="width: 100px;" type="text"/>	State Aid [\$0.00] <input style="width: 100px;" type="text"/>
Payment Status: Not Reconciled	Payment Status: Not Reconciled

Save
Back
Reset

2. A pop up box will confirm that your transaction has been saved.
 - a. Once a transaction has been saved, the newly reported data will be reflected the following Monday after CSAC completes the weekly processing of files.
3. If after submitting a transaction, you would like to delete the submission, you can do so by re-selecting the "Correction" radio button, then selecting the "Delete" radio button.
4. Once a correction has been processed, you can view the prior transaction through the student's Payment History Screen.
5. From the MCS Online Payment Roster, click the "Payment History" link.

Middle Class Scholarship - Online Payment Roster

Demographic Information		Annual Data	
RODRIGUEZ, HERMAN N		Open Terms:	Fall, Winter, Spring
CSAC ID:	101308180	Total Income:	\$101,000.00 <input style="width: 100px;" type="text"/>
SSN No:	XXX - XX - 3411	Federal Aid:	\$0.00 <input style="width: 100px;" type="text"/>
DOB:	05/28/1996	Institutional Aid:	\$0.00 <input style="width: 100px;" type="text"/>
Cal Grant Award:	\$0.00	State Aid:	\$0.00 <input style="width: 100px;" type="text"/>
Annual Award:	\$1,465.00	ISIR Tran #:	02 <input style="width: 100px;" type="text"/>
Annual Tuition/Fees:	\$10,628.00	Eligibility Change:	<input type="text" value="--- SELECT ---"/> Payment History

Transaction Type: **Correction** ☐ **Payment** ☐

6. A pop-up window will open the MCS – Student Payment History screen.

MCS - STUDENT PAYMENT HISTORY

Student Name: RODRIGUEZ, HERMAN N SSN: XXX - XX - 3411
CSAC ID: 101308180

Institution Name	Acad Year	Term	Pay Amt	Pay Type	Pay Status	Adj Reason	Date	Created By
UNIV OF CA - IRVINE	2014	FL		C		4	10/22/2014	T2_TK1

7. The payment history screen will provide information on any transaction that has been processed for that student, both payment and correction information.

Example 3: Corrections to a student with a reconciled payment (Annual or Term level changes)

1. Follow the correction methodology described above for either Annual or Term level corrections.
2. If the corrections submitted make the student ineligible for the MCS program (Total Income exceeds \$150,000, SAP (at the Annual Level), etc.), the student will still remain on your campus roster.
 - a. The week following the correction, the student will appear with a “Recertify Payment” status under the “Adj. Reason Code”.

WINTER TERM

Enrollment Status [HT or more- (Pay)]	-- SELECT --
Term Award Amount [\$0.00]	\$0.00
Adj. Reason Code [Recertify Payment]	-- SELECT --
Amount Paid/Verified [\$256.00]	
Tuition/Fees [\$1,824.00]	
Federal Aid [\$0.00]	
Institutional Aid [\$0.00]	
State Aid [\$0.00]	
Payment Status: Reconciled	

3. To recertify the payment (in this case, for a student who's income was adjusted above the \$150,000 limit), select the "Payment" radio button.
4. In the term you are recertifying, select Enrollment Status "HT or more – (Pay)"
 - a. When you select the Enrollment Status, the Amount Paid/Verified will default to \$0.00 to reflect the adjusted award amount based on the correction previously submitted.
 - i. You will see the previous Amount Paid/Verified in brackets

Demographic Information		Annual Data	
SCOTT, LINDA L		Open Terms:	Fall, Winter, Spring
CSAC ID:	101308124	Total Income:	\$155,375.00
SSN No:	XXX - XX - 6608	Federal Aid:	\$0.00
DOB:	07/22/1996	Institutional Aid:	\$0.00
Cal Grant Award:	\$0.00	State Aid:	\$0.00
Annual Award:	\$0.00	ISIR Tran #:	01
Annual Tuition/Fees:	\$5,472.00	Eligibility Change:	-- SELECT --
		Payment History	

Transaction Type: Correction ☐ Payment ☒

FALL TERM	WINTER TERM	SPRING TERM
Enrollment Status: -- SELECT --	Enrollment Status: HT or more- (Pay)	Enrollment Status: -- SELECT --
Term Award Amount: \$0.00	Term Award Amount: \$0.00	Term Award Amount: \$0.00
Adj. Reason Code: -- SELECT --	Adj. Reason Code: -- SELECT --	Adj. Reason Code: -- SELECT --
Amount Paid/Verified: \$0.00	Amount Paid/Verified: \$0.00	Amount Paid/Verified: \$0.00
Tuition/Fees: \$1,824.00	Tuition/Fees: \$1,824.00	Tuition/Fees: \$1,824.00
Federal Aid: \$0.00	Federal Aid: \$0.00	Federal Aid: \$0.00
Institutional Aid: \$0.00	Institutional Aid: \$0.00	Institutional Aid: \$0.00
State Aid: \$0.00	State Aid: \$0.00	State Aid: \$0.00
Payment Status: Reconciled	Payment Status: Reconciled	Payment Status: Not Reconciled

Save Back Reset

5. Then click "Save".
6. After the weekly processing, this student will be removed from your campus roster and their award status will be changed to "Financially Ineligible".
 - a. If the correction that cause the payment to need to be recertified did not make the student ineligible for the MCS program, after the recertification of their payment, they will remain on your campus roster.
 - b. Campus may utilize the Payment History screen to view an account of the student's payment and transaction history.

3.4.4 CORRECTION PROCESS QUESTIONS:

Question: How would we report a record for a student whose total grant aid is less than 40% of systemwide Tuition/Fees, but the student is receiving other aid (scholarship assistance or Blue and Gold gift aid) that meets their full need, so the student has no eligibility?

Answer:

Question: If our campus sent a new enrollment file last week, on which either income or grant aid changed, will CSAC be recalculating the student's MCS eligibility?

Answer: This depends on the student's award status. If the student has already been awarded an MCS, the resubmitting new information via the enrollment file will only "pend" the newly submitted record. You would need to utilize the correction process to apply any new information for an awarded student. If the student has not been awarded, you may submit new information for that student via an enrollment file, at which point they would be reprocessed through the awarding cycle to determine eligibility.

Question:

REFERENCE INFORMATION

For more information visit the *Middle Class Scholarship Information* webpage on the California Student Aid Commission website.

<http://www.csac.ca.gov/doc.asp?id=1481>

Attachment 1 – MCS Payment Roster Field Mapping

[MCS - Roster](#)
[MCS Display Roster](#)

Middle Class Scholarship - Online Payment Roster

Demographic Information	Annual Data
<p>Last Name, First Name MI 5 6 7</p> <p>C SAC ID: 000000000</p> <p>SSN No: 4 XXX - XX - 0000</p> <p>DOB: 8 00/00/0000</p> <p>Cal Grant Award: \$0.00</p> <p>Annual Award: 18 0,000</p> <p>Annual Tuition/Fees: \$00,000.00 19</p>	<p>Open Terms: Fall</p> <p>Total Income: 11 \$000,000.00 <input style="width: 100px;" type="text"/></p> <p>Federal Aid: 12 \$0.00 <input style="width: 100px;" type="text"/></p> <p>Institutional Aid: 13 \$0.00 <input style="width: 100px;" type="text"/></p> <p>State Aid: 14 \$0.00 <input style="width: 100px;" type="text"/></p> <p>ISIR Tran #: 9 01 <input style="width: 100px;" type="text"/></p> <p>Eligibility Change: 41 --- SELECT --- Payment History</p>

Transaction Type: 42 ☒ **Correction** ☐ **Payment**

FALL TERM	WINTER TERM	SPRING TERM
Enrollment Status: 15 --- SELECT ---	Enrollment Status 16 --- SELECT ---	Enrollment Status 17 --- SELECT ---
Term Award Amount 20 <input style="width: 100px;" type="text"/>	Term Award Amount 27 <input style="width: 100px;" type="text"/>	Term Award Amount 34 <input style="width: 100px;" type="text"/>
Adj. Reason Code 22 --- SELECT ---	Adj. Reason Code 29 --- SELECT ---	Adj. Reason Code 36 --- SELECT ---
Amount Paid/Verified 21 <input style="width: 100px;" type="text"/>	Amount Paid/Verified 28 <input style="width: 100px;" type="text"/>	Amount Paid/Verified 35 <input style="width: 100px;" type="text"/>
Tuition/Fees 23 <input style="width: 100px;" type="text"/>	Tuition/Fees 30 <input style="width: 100px;" type="text"/>	Tuition/Fees 37 <input style="width: 100px;" type="text"/>
Federal Aid 24 <input style="width: 100px;" type="text"/>	Federal Aid 31 <input style="width: 100px;" type="text"/>	Federal Aid 38 <input style="width: 100px;" type="text"/>
Institutional Aid 25 <input style="width: 100px;" type="text"/>	Institutional Aid 32 <input style="width: 100px;" type="text"/>	Institutional Aid 39 <input style="width: 100px;" type="text"/>
State Aid 26 <input style="width: 100px;" type="text"/>	State Aid 33 <input style="width: 100px;" type="text"/>	State Aid 40 <input style="width: 100px;" type="text"/>
Payment Status: Not Reconciled	Payment Status: Not Reconciled	Payment Status: Not Reconciled

Save
Back
Reset

MCS - Roster
MCS Display Roster

Middle Class Scholarship - Online Payment Roster

Demographic Information

Last Name, First Name MI
5 6 7

CSAC ID: 000000000

SSN No: 4 XXX-XX-XXXX

DOB: 8

Cal Grant Award:

Annual Award: 18 0,000

Annual Tuition/Fees: \$00,000.00
19

Annual Data

Open Terms: Fall

Total Income: 11 \$00,000.00

Federal Aid: 12 \$00,000.00

Institutional Aid: 13 \$0.00

State Aid: 14 \$0.00

ISIR Tran #: 9 01

Eligibility Change: 41 --- SELECT ---

[Payment History](#)

Transaction Type: 42
Correction ☒
Payment ☐

FALL TERM

Enrollment Status: 15 --- SELECT ---

Term Award Amount 20

Adj. Reason Code 22 --- SELECT ---

Amount Paid/Verified 21

Tuition/Fees 23

Federal Aid 24

Institutional Aid 25

State Aid 26

Payment Status: Not Reconciled

WINTER TERM

Enrollment Status 16 --- SELECT ---

Term Award Amount 27

Adj. Reason Code 29 --- SELECT ---

Amount Paid/Verified 28

Tuition/Fees 30

Federal Aid 31

Institutional Aid 32

State Aid 33

Payment Status: Not Reconciled

SPRING TERM

Enrollment Status 17 --- SELECT ---

Term Award Amount 34

Adj. Reason Code 36 --- SELECT ---

Amount Paid/Verified 35

Tuition/Fees 37

Federal Aid 38

Institutional Aid 39

State Aid 40

Payment Status: Not Reconciled

Save Back Reset

Enrollment Status Values

1= HT or More

2= Less Than HT (Do not Pay)

3=Not Enrolled

Eligibility Change Values

1= Post BACC

2= SAP

3 =Eligibility

4= Not Enrolled

Adj. Reason Code Values

1= Post BACC

2= SAP

3=Eligibility

4=Fees

5=Refund/Adjusted Payment

6=Recertify Payment (CSAC use only)

Attachment 2 – MCS Correction Scenarios

DRAFT


CORRECTIONS AND PAYMENTS			
Scenario	Correction Type	MCS Online Payment Roster Screen	Batch – Payment File Upload
<p>1. Student's annual Pell grant has decreased</p> <p><i>Continues with Scenario 8</i></p>	Annual	<ul style="list-style-type: none"> • Select Correction radio button • Select "Eligibility" on Eligibility Change drop down • Enter new annual Pell grant in the Federal Aid field and hit save • The student's MCS award will be recalculated with new Pell figures and update MCS award information will be available the following Monday. 	<ul style="list-style-type: none"> • Field 12 (Student's Federal Aid) – Enter new annual Pell Grant • Field 41 (Eligibility Change) - Select 3 for Eligibility • Field 42 (Transaction Type) – Enter C for "Correction"
2. Student's annual total income has increased	Annual	<ul style="list-style-type: none"> • Select Correction radio button • Select "Eligibility" on Eligibility Change drop down • Enter new annual total income in the total Income field and hit save • The student's MCS award will be recalculated with new income and update MCS award 	<ul style="list-style-type: none"> • Field 11 (Total Income) – Enter new total income • Field 41 (Eligibility Change) - Select 3 for Eligibility • Field 42 (Transaction Type) – Enter C for "Correction"

		<p>information will be available the following Monday.</p> <ul style="list-style-type: none"> • Multiple annual level changes can be made in the same week. For example, the Pell grant decrease from example #1 and the total income increase from example #2 can be submitted together on the same transaction. 	
<p>3. Student is not eligible for MCS due to SAP, Post-Bac or not enrolled. The campus wants remove student from MCS roster.</p>	Annual	<ul style="list-style-type: none"> • Select Correction radio button • Select "Eligibility" on Eligibility Change drop down and select the appropriate reason (SAP, Post Bacc or Not Enrolled.) • Student will be removed from MCS roster the following Monday. 	<ul style="list-style-type: none"> • Field 41 (Eligibility Change) - Select (1, 2 or 4) for Post Bacc, SAP and Not Enrolled • Field 42 (Transaction Type) – Enter C for "Correction" • If a payment exists for either the FL, WN, SP terms; make sure to remove the information from the payment file: <ul style="list-style-type: none"> ○ Students' Enrollment Status (Fields 15, 16, 17) ○ MCS Award Payment (Fields 21, 28, 35) <p><i>NOTE:</i> If the payments are not removed from the file for either term, the system will assume you</p>

			<i>are attempting to make both a payment and a correction for the same student record.</i>
<p>4. SCHOOL CHANGE</p> <p>PROCESS: Student appears on your campus and you submit an enrollment file record for MCS eligibility.</p>	<p>Enrollment File</p>	<ul style="list-style-type: none"> • Outcome #1 – Using example #3 from above, since student has been removed from the roster using the “Not Enrolled”, student will process and if eligible, will appear on Campus B roster the following Monday. • Outcome #2 – Student is claimed on another campus and will appear on your MCS Enrollment Process eligibility report as pending – on another campus’ roster. 	<ul style="list-style-type: none"> • Outcome #1 – CAMPUS A: Field 41 (Eligibility Change) - Select 4 for Not Enrolled to remove student from your roster. • Field 42 (Transaction Type) – Enter C for “Correction” <p>CAMPUS B – Submit Enrollment file and will appear on MCS roster.</p> <p>Field 9 (Student’s Status) of the Enrollment file – Submit a 3 if a WN Transfer or a 4 if a SP Transfer</p> <ul style="list-style-type: none"> • Outcome #2 – CAMPUS A: Field 41 (Eligibility Change) - Select 4 for Not Enrolled to remove student from your roster.

			<ul style="list-style-type: none"> Field 42 (Transaction Type) – Enter C for “Correction” <p>CAMPUS B – Submit Enrollment file and will appear on Enrollment eligibility report as pending.</p>
<p>5. Student’s tuition for fall term has decreased due to official part –time status</p> <p>Student’s tuition for spring term has increased for being part of the teacher credential program.</p> <p><i>Continues with Scenario 9</i></p>	Term	<ul style="list-style-type: none"> Select Correction radio button Select “Fees” on Adjustment reason drop down for fall term and enter value for new tuition/fees amount. Select “Fees” on Adjustment reason drop down for spring term and enter value for new tuition/fees amount. Hit Save and both corrections will be processed. 	<ul style="list-style-type: none"> Field 22 (Fall Adjustment Reason Code) - Select 4 for Fees Field 23 (Fall Tuition) – Enter new tuition value Field 36 (Spring Adjustment Reason Code) - Select 4 for Fees Field 37 (Spring Tuition) – Enter new tuition value Field 41 (Eligibility Change) – Leave blank Field 42 (Transaction Type) – Enter C for “Correction”
6. Student has been paid for full time for fall, but	Term	<ul style="list-style-type: none"> Select Correction radio button 	<ul style="list-style-type: none"> Field 29 (Winter Adjustment Reason Code) - Select 3 for Eligibility

<p>decides to officially go part time for winter or spring. As a result, his Pell grant for winter or spring decreases.</p>		<ul style="list-style-type: none"> • Select “Eligibility” on Adjustment reason drop down for either the winter or spring term and enter value for new tuition/fees amount. • In addition, enter new Winter or Spring Federal Aid amount since Pell was reduced and hit “Save” • The student’s Winter or Spring MCS award will be recalculated with new Pell and tuition amounts. The MCS award information will be available the following Monday. • The Fall and Spring MCS term amounts will be different since the Winter or Spring terms were re-evaluated. However, the sum of the fall, winter and spring term amounts will add to the annual amounts. 	<ul style="list-style-type: none"> • Field 30 (Winter Tuition/Fee Amount) – Enter new tuition value • Field 31 (Winter Federal Aid Amount) – Enter new Pell value • Field 36 (Spring Adjustment Reason Code) - Select 3 for Eligibility • Field 37 (Spring Tuition/Fee Amount) – Enter new tuition value • Field 38 (Spring Federal Aid) – Enter new Pell value • Field 41 (Eligibility Change) – Leave blank • Field 42 (Transaction Type) – Enter C for “Correction” • If a payment exists for either term; make sure to remove the information from the payment file: <ul style="list-style-type: none"> ○ Students’ Enrollment Status (Fields 15, 16, 17) ○ MCS Award Payment (Fields 21,
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			28, 35)
			<p><u>NOTE:</u> If the payments are not removed from the file for either term, the system will assume you are attempting to make both a payment and a correction for the same student record.</p>
<p>7. Student’s annual total income decreases and the winter or spring institutional aid increases.</p> <p><i>This scenario continues with Scenario 10 to Recertify Payment and complete the Term Adjustment (Weeks 2 and 3)</i></p>	<p>1. Annual</p> <p>2. Recertify (Term)</p> <p>3. Term</p>	<p><u>WEEK 1:</u></p> <ul style="list-style-type: none"> Select Correction radio button Select “Eligibility” on Eligibility Change drop down in the Annual Data section and enter new reduced income in the Total Income field and hit save. <p> In order to apply the winter or spring term change, the campus must wait for CSAC to process the annual change from WEEK 1 first and complete the WEEK 2 transaction.</p>	<p><u>WEEK 1:</u></p> <ul style="list-style-type: none"> Field 11 (Total Income) – Enter reduced income Field 41 (Eligibility Change) - Enter 3 for Eligibility Field 42 (Transaction Type) – Enter C for “Correction” <p><u>WEEK 2:</u></p> <ul style="list-style-type: none"> The annual award is re-calculated and changes the term award amounts. If a payment existed for the FL/WN term, the payment is put into a “Recertify

		<p><u>WEEK 2:</u></p> <ul style="list-style-type: none"> The annual award is re-calculated and changes the term award amounts. If a payment existed for the FL/WN term, the payment is put into a “Recertify Payment” status with the new term award amount. The WN/SP terms cannot be adjusted until the payment is certified first. If a payment does not exist for the FL/WN terms, you can proceed with WEEK 3. RECERTIFYING A PAYMENT THROUGH THE ROSTER SCREEN Select Payment radio button In the Winter or Spring term, select Refund/Adjusted Payment from the Adj. Reason Code drop down menu Enter the adjusted amount in the Amount Paid/Verified field 	<p>Payment” status with the new term award amount. (Fields 29 & 36 = 6 for WN & SP terms. The WN/SP terms cannot be adjusted until the payment is certified first.</p> <ul style="list-style-type: none"> If a payment does not exist for the FL/WN terms, you can proceed with WEEK 3. RECERTIFYING A PAYMENT THROUGH THE PAYMENT FILE Field 15 (Student’s Fall Enrollment Status) – Enter 1 for HT or more (Pay) Field 21 (Fall MCS Award Payment) – Enter the new payment amount (this should equal the value in Field 20, Fall MCS Award Amount). Field 22 (Fall Adjustment Reason Code) – Remove the number 6 (leave blank) Field 42 (Transaction Type) – Enter P for “Payment Info”
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		<p><u>WEEK 3:</u></p> <ul style="list-style-type: none"> • After the annual level change and/or the recertify payment has been processed. • Select “Correction” radio button • Select “Eligibility” on the Adj. Reason Code drop down menu for the Winter or Spring term. • Enter the new value amount in the Institutional Aid field. 	<p><u>WEEK 3:</u></p> <ul style="list-style-type: none"> • Field 29 (Winter Adjustment Reason Code) - Select 3 for Eligibility • Field 32 (Winter Institutional Aid) – Enter new institutional value • Field 36 (Spring Adjustment Reason Code) - Select 3 for Eligibility • Field 39 (Spring Institutional Aid) – Enter new institutional value • Field 42 (Transaction Type) – Enter C for “Correction” <p><i>See “NOTE” in Scenario #6 if payments exist in prior terms</i></p>
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<p>8. Student's annual Pell grant has increased</p> <ul style="list-style-type: none"> Fall term MCS paid - \$200 New Fall term MCS - \$100 <p><i>Continuation of Scenario 1 starts with Week 2</i></p>	<p>Annual</p>	<p><u>WEEK 1:</u></p> <ul style="list-style-type: none"> Select "Correction" radio button Select "Eligibility" on Eligibility Change drop down Enter new annual Pell grant in the Federal Aid field and hit save The student's MCS award will be recalculated with new Pell figures and update MCS award information will be available the following Monday. <p><u>WEEK 2:</u></p> <ul style="list-style-type: none"> Campus must recertify new Fall Term \$100 payment on roster following normal payment procedures 	<p><u>WEEK 1:</u></p> <ul style="list-style-type: none"> Field 12 (Student's Federal Aid) – Enter new annual Pell Grant amount Field 41 (Eligibility Change) – Enter 3 for Eligibility Field 42 (Transaction Type) – Enter C for "Correction" <p><u>WEEK 2:</u></p> <ul style="list-style-type: none"> New payment roster will display in Field 22 with the #6 value of "Recertify Payment"

		<i>Refer to Scenarios 7 and 10 for the Recertify Payment process</i>	<i>Refer to Scenarios 7 and 10 for the Recertify Payment process</i>
<p>9. Student's tuition for spring term has increased for being part of the teacher credential program.</p> <ul style="list-style-type: none"> Spring term MCS paid - \$300 New Spring term MCS - \$400 <p><i>Continuation of Scenario 5 starts with Week 2</i></p>	Term	<p><u>WEEK 1:</u></p> <ul style="list-style-type: none"> Select "Correction" radio button Select "Fees" on Adjustment reason drop down for spring term and enter value for new tuition/fees amount. Hit Save and both corrections will be processed. <p><u>WEEK 2:</u></p> <ul style="list-style-type: none"> Campus must recertify new Spring Term \$400 payment on roster <p><i>Refer to Scenarios 7 and 10 for the Recertify Payment process</i></p>	<p><u>WEEK 1:</u></p> <ul style="list-style-type: none"> Field 36 (Spring Adjustment Reason Code) - Select 4 for Fees Field 37 (Spring Tuition) – Enter new tuition value Field 42 (Transaction Type) – Enter C for "Correction" <p><u>WEEK 2:</u></p> <ul style="list-style-type: none"> New payment roster will display on Field 22 the #6 value of "Recertify Payment" <p><i>Refer to Scenarios 7 and 10 for the Recertify Payment process</i></p>
10. Student's annual total	1. Annual	<u>WEEK 1:</u>	<u>WEEK 1:</u>

<p>income decreases and winter or spring institutional aid increases.</p> <p><i>Continuation of Scenario 7 starts with Week 2</i></p> <ul style="list-style-type: none"> Fall term MCS Award paid - \$330 		<ul style="list-style-type: none"> Select Correction radio button Select "Eligibility" on Eligibility Change drop down in the Annual Data section and enter new reduced income in the Total Income box and hit save. In order to apply the winter or spring term change, the campus must wait for CSAC to process the annual change from WEEK 1 first. 	<ul style="list-style-type: none"> Field 11 (Total Income) – Enter reduced income Field 41 (Eligibility Change) - Enter 3 for Eligibility Field 42 (Transaction Type) – Enter C for "Correction"
<ul style="list-style-type: none"> New Fall term MCS Award - \$348 (Amount to be Recertified) New Winter or Spring Term MCS Award - \$348 	<p>2. Recertify (Term)</p>	<p><u>WEEK 2:</u></p> <ul style="list-style-type: none"> The annual award is re-calculated and changes the term award amounts. If a payment existed for the FL/WN term, the payment is put into a "Recertify Payment" status with the new term award amount. The WN/SP terms cannot be adjusted until the payment is certified first. If a payment does not exist for the FL/WN terms, you can proceed with WEEK 3. 	<p><u>WEEK 2:</u></p> <ul style="list-style-type: none"> The annual award is re-calculated and changes the term award amounts. If a payment existed for the FL/WN term, the payment is put into a "Recertify Payment" status with the new term award amount. (Fields 29 & 36 = 6 for WN & SP terms. The WN/SP terms cannot be adjusted until the payment is certified first. If a payment does not exist for the FL/WN terms, you can proceed with WEEK 3.

<ul style="list-style-type: none"> New Winter or Spring Term Institutional Aid - \$100 	<p>3. Term</p>	<ul style="list-style-type: none"> RECERTIFYING A PAYMENT THROUGH THE ROSTER SCREEN Select Payment radio button In the Winter or Spring term, select Refund/Adjusted Payment from the Adj. Reason Code drop down menu Enter the adjusted amount in the Amount Paid/Verified field WEEK 3: After the annual level change and/or the recertify payment has been processed. Select "Correction" radio button Select "Eligibility" on the Adj. Reason Code drop down menu for the Winter or Spring term. Enter the new value amount in the Institutional Aid field. 	<ul style="list-style-type: none"> RECERTIFYING A PAYMENT THROUGH THE PAYMENT FILE Field 15 (Student's Fall Enrollment Status) – Enter 1 for HT or more (Pay) Field 21 (Fall MCS Award Payment) – Enter the new payment amount (this should equal the value in Field 20, Fall MCS Award Amount). Field 22 (Fall Adjustment Reason Code) – Remove the number 6 (leave blank) Field 42 (Transaction Type) – Enter P for "Payment Info" WEEK 3: Field 29 (Winter Adjustment Reason Code) - Select 3 for Eligibility Field 32 (Winter Institutional Aid) –
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			<p>Enter new institutional value</p> <ul style="list-style-type: none"> Field 36 (Spring Adjustment Reason Code) - Select 3 for Eligibility Field 39 (Spring Institutional Aid) – Enter new institutional value Field 42 (Transaction Type) – Enter C for “Correction” <p><i>See “NOTE” in Scenario #6 if payments exist in prior terms</i></p>
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